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THE UNIVERSITY OF ALBERTA

ALBERTA GOVERNMENT PROVISIONS FOR THE FINANCING
AND CONSTRUCTION OF SCHOOL BUILDINGS

by

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A THESIS

SUBMITTED TO THE FACULTY OF GRADUATE STUDIES
IN PARTIAL FULFILMENT OF THE REQUIREMENTS FOR THE DEGREE OF
MASTER OF EDUCATION

DEPARTMENT OF EDUCATIONAL ADMINISTRATION

EDMONTON, ALBERTA

APRIL, 1965

UNIVERSITY OF ALBERTA
FACULTY OF GRADUATE STUDIES

The undersigned certify that they have read, and recommend to the Faculty of Graduate Studies for acceptance, a thesis entitled, "Alberta Government Provisions for the Financing and Construction of School Buildings", submitted by Ronald Lewis Rhine in partial fulfilment of the requirements for the degree of Master of Education.

ACKNOWLEDGMENTS

Sincere thanks are expressed to all those who have patiently helped in the development of this thesis. Among those included are the Committee members and others with the Faculty of Education, members of the Edmonton Public School System, officials with the Department of Education, my own family, and Mrs. Mae Cox, friend and typist.

- R.L.R.

ABSTRACT

The legislation and regulations which concerned the financing of education in Alberta were changed in 1961 with the introduction of the School Foundation Program Fund. At the same time, the regulations were changing with respect to the construction of school buildings. The purpose of this study was to investigate certain issues created for the Edmonton Public Schools by the provincial provisions for the financing and construction of school buildings as specified in The School Foundation Program Fund Regulations, The School Buildings Act, and the respective Regulations. The thesis was that the legislation and regulations had created certain problems regarding the financing and construction of Edmonton's Public Schools.

The related legislation, regulations, directives, forms and handbooks were analyzed in an effort to infer the possible effects upon the Edmonton Public Schools. This analysis was followed by the examination of public records and by interviews with officials of both the local board and the Department of Education in an effort to ascertain the actual effects. The legislation was then evaluated in terms of five sub-problems and in terms of certain principles of educational finance. The principles of educational finance used were some of those found in the related literature.

The study indicated that the legislation did not seem to be unduly restrictive to the local officials who planned the schools,

although there were some problems. There appeared to be a need for the local board to observe closely the limits imposed by the Government to the cost per gross square foot of building. There was a need for some provincial provisions with respect to land purchase, site preparation, and warehouse or office facilities. So that the local board could provide the facilities and service which it deemed necessary or desirable, supplementary requisitions were required each year. There was evidence to indicate that the costs of education were still rising, and that there may be an extra burden of costs due to the legislation. Local autonomy appeared to be reduced, but the responsibility of the local board for providing adequate school buildings had also been reduced. In addition, the local board had been removed further from the right to control its own finances. The legislated provisions had been modified in practice by the discretionary powers of the School Buildings Board or the Minister of Education. Thus, the scheme had been quite adaptable. The flexibility of the scheme was less certain for, although an adequate number of classrooms were approved or built to meet the expected needs, there did not seem to be recognition in the legislation of the differences in administrative organization between the small school systems and those that were more complex. There may be a need to re-assess the legislative provisions in order to make allowances for the differences in situations and personnel.

Finally, the evidence indicated that at the present time the Alberta Government is in the process of revising the legislation in order to have it state the conditions which are actually permitted for the financing and construction of school buildings.

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CHAPTER I

THE PROBLEM AND DEFINITIONS OF TERMS USED

Controversy about the School Foundation Plan began when the scheme was first suggested. Arguments both pro and con about its effects, and the effects of other legislation which concerns school building construction, have been presented since that time. Much of the criticism seems to have been directed towards the supposedly adverse effects on the city public school systems. No formal and independent studies to investigate the validity of the various statements have as yet been made.

I. THE BACKGROUND TO THE 1963 LEGISLATION

The School Borrowing Assistance Act of 1950 had permitted any school division or independent district to obtain money for approved capital borrowing toward the cost of new schools from the School Borrowing Revolving Fund set up by the province for that purpose. Twenty-five per cent of the total authorized borrowing could be obtained from the Fund. Half the money borrowed from the Fund did not have to be repaid and, thus, became a grant. The other half had to be repaid without interest by means of ten equal annual instalments. The Act also guaranteed the interest payment on any debentures issued to finance the balance of the money required.

The School Borrowing Assistance Act was repealed in 1952 and replaced by The School Building Assistance Act. This Act increased the grant to twenty-five per cent of the estimated cost of construction or purchase price of a school building, including the site and equipment. The Act also made available loans from the government to be not in excess of twenty-five per cent of the estimated cost and at a rate of three and one-third per cent interest repayable over the same term as the debentures sold. Again, the government guaranteed the payment of the interest on any debentures sold to raise the balance of the money.

In 1953 the grant was set at a maximum of \$4000 per standard classroom. In addition to the grant, the maximum for the provincial loan was increased from twenty-five to forty per cent of the estimated cost approved for assistance. Revisions in 1954, 1955, and 1958 changed the maximum grant from \$4000 per classroom to from \$5000 to \$7500 per classroom depending upon the size of the school. Grants were increased by ten per cent if the building were to be of brick or steel construction.

In addition to the revision in maximum grant per classroom in 1955, the government increased the maximum amount of provincial loan to equal the estimated cost of construction or purchase less the amount of any grant. The provisions for provincial loans and interest guarantees on approved borrowing were repealed in 1958. In 1959, the construction grants were extended to cover Public

Junior Colleges and to school divisions operating an unincorporated Junior College. In 1960 grants towards the cost of school sites and equipment were officially dropped.

In 1961, The Alberta Provincial Government established the School Foundation Program Fund. This Act radically changed the method of school financing. Under the School Foundation Program Fund legislation each school division or independent district received a grant of \$47 per pupil payable in quarterly installments for actual expenditures made for debenture principal and interest payable during the year and for repayment of approved short term capital loans. When the total grant exceeded the approved expenditures the division could use the excess for any lawful and necessary purpose provided that it was first applied toward¹ capital expenditure made from current revenue.

In 1962 the provisions of the School Foundation Program Fund were changed so that the grant for debt retirement and capital expenditure was determined by multiplying the average numbers of elementary, junior high and senior high school pupils by amounts per pupil respectively of \$40, \$55 and \$65, and adding the three products. These grants could be used to pay off debenture obligations due and payable during the year exclusive of the obligations

1

Kenneth Grant Crawford, Provincial Grants to Canadian Schools, 1941 to 1961 (Toronto: Canadian Tax Foundation, 1962), pp. 189 - 210.

resulting from building or purchasing offices, garages, warehouses, or residences or the purchasing of land, buses or other vehicles during or following 1961. Any excess of grant was to be held and used in subsequent years towards the cost of construction of any project approved by the School Buildings Board or the School Buildings Assistance Board. Where the grant was insufficient to meet the obligations of approved costs the Fund would provide additional amounts to meet the need, but any amount standing to the credit of the division would be first applied.²

In 1962, also, the School Building Assistance Act was repealed, except for obligations which had been contracted under its terms, and the School Buildings Act was passed. This Act required that a school division apply to the School Buildings Board for approval of any school building project the cost of which was to be paid for in whole or in part from funds available for capital purposes, including the retirement of capital borrowings, under the School Foundation Program Fund Regulations. The need for the proposed construction or purchase, the nature and suitability of it, and the method of financing had each to be approved according to regulations applicable under The School Buildings Act. Furthermore, any modifications of the plans had to meet the approval of the School

2

School Foundation Program Fund Regulations. (Order-in-Council 546/62), Government of Alberta.

Buildings Board. Any project, or any portion of a project, not approved by this Board as coming within the scope of the regulations could not be regarded as a charge against the School Foundation Program Fund. Provision in the School Buildings Act was made for the Government to retain monies payable to a school division which failed to meet contracted obligations towards the repayment of principal owing the Government and the payment of interest guaranteed by the Government either for government loans or debenture payments. The amounts retained and paid to the Provincial Treasurer were deemed to have been paid and received by the school division on account of the legislative grant to the school division for that year.

Those regulations applicable under the terms of the School Foundation Program Fund, The School Buildings Act, and The School Buildings Act Regulations were revised again in 1963.

The Regulations pursuant to the School Foundation Program Fund required every municipality to pay into the Fund an amount equal to a levy of 32 mills on the equalized assessment of the municipality. The equalized assessment included the assessment of ordinary property and also of federal and provincial properties for which grants in lieu of taxes were received, industrial properties, pipelines, and power lines. These amounts or requisitions together with the legislative grants for school purposes formed the Fund out of which school boards received their chief revenue payable on

a quarterly basis. If the amount received by a school board out of the Fund were not sufficient to meet its needs it could requisition the appropriate municipality or municipalities for the necessary additional money.

At first, in 1961, payments from the Fund had been made to the independent school district or to a division toward instruction, maintenance of school plant, instructional aids and materials, transportation and maintenance of pupils, administration, and capital expenditures. By 1963, the sections titled, Maintenance of School Plant, and Instructional Aids and Materials, had been eliminated as separate categories. Capital Expenditures had been reclassified as Debt Retirement and Capital Expenditures.

II. PURPOSE OF THE STUDY

Education is basic to the efficient and effective operation of democratic self-government. Unless the population is truly educated in its cultural heritage, in the arts of thinking and reasoning, and in the basic tools of communication, the individual citizens are handicapped in exercising the duties which generate, foster, and develop the concept of democracy as we know it. The state has much to gain or to lose by the adequacies or inadequacies of the educational program.

At the time of Confederation, the British North America Act (Section 93) assigned authority for education to the provinces as

a specific responsibility. The provincial legislatures delegated part of this responsibility to the School Boards or other local agencies. It remains the right of the provincial body to retract or amend this local authority in any way it so desires.

"School finance is truly the backbone of the educational program."³ Statements like this are particularly apt in an age when education has become a specialized function of the state requiring the use of millions of dollars just to maintain a minimum program of education for all concerned. Whatever provincial policy in finances is decided upon is likely to have some impact upon the local program. It has been stated that although generous financial support does not alone insure satisfactory schools, there is a strong relationship "between adequate monies for education and the quality of the school program that is offered."⁴ If finance is the backbone of the educational program, and the state provides a large share of the support, it follows that any change in legislation which alters the financial support upon which the education program rests is bound to alter the program to some degree, good or bad. Thus Rosenstengel and Eastmond say:

They (experts in school finance) have repeatedly pointed out the necessity of appraising a state's fiscal

3

William Everett Rosenstengel and Jefferson N. Eastmond, School Finance: Its Theory and Practice (New York: The Ronald Press Company, 1957), p. 5

4

Ibid.

policy in terms of (1) established principles of school finance and (2) the impact of these policies on local organizational structures.⁵

The intent of this study was to investigate certain issues created for the Edmonton Public Schools by the provincial provisions for the financing and construction of school buildings as specified in The School Foundation Program Fund Regulations, The School Buildings Act, and the respective Regulations. The thesis was that the legislation and regulations had created certain problems regarding the construction or financing of Edmonton's Public Schools.

III. THE NEED FOR THE STUDY

The need to investigate the impact upon the Edmonton Public Schools of the provincial provisions for the financing and construction of school buildings can be summarized under four points.

First, Mort, Reusser and Polley advocate that any new scheme of educational finance needs evaluation with respect to the adaptability principle,⁶ and the foundation program implemented in 1961 was new to Alberta.

Secondly, whether the plan made adequate provision for financial support needs evaluation. As Burke has claimed, the imple-

5

Ibid.

6

Paul R. Mort, Walter C. Reusser and John W. Polley, Public School Finance: Its Background, Structure and Operation (New York: McGraw-Hill Book Company, Inc., 1960), p. 37.

mentation of an equalization program in no way guarantees the adequacy of the program.⁷ Because there are value judgments involved, to prove indisputably whether the Program is or is not adequate may be impossible to do, but it is a worthy area of investigation.

Third, whether or not there has been a loss of local autonomy and whether or not there has been a greater degree of centralization involved needs examination. The concerns of Burke⁸, Clarke⁹, McCall¹⁰, and others¹¹ require investigation of this.

Fourth, there is a need to substantiate or refute the various claims as to the adequacy or inadequacy of the Foundation Program plan and the related legislation.

That the time for an investigation has arrived is supported not only by recent actions of the Alberta Teachers' Association but also by the former Minister of Education's recommendations, made in

7

Arvid J. Burke, Financing Public Schools in the United States (New York: Harper and Brothers, 1957), p. 220.

⁸Ibid., p. xv (Preface) and p. 296.

⁹S. C. T. Clarke, "The Secretary Reports: Spiralling Costs or Educational Investment?" The ATA Magazine, Vol. 43, No. 4, December, 1962, p. 48.

¹⁰H. C. McCall, "The President's Column", The ATA Magazine, Vol. 43, No. 2, October 1962, p. 43.

¹¹For example, the "Submission of the Edmonton School District No. 7 to the Agriculture Committee of the Legislative Assembly, Province of Alberta, Re School Financing Program." Submitted by Chairman R. V. Johnson, April 4, 1961, pp. 1 - 7.

1961, to evaluate the program after it had been in operation for two or three years. The Foundation Program has been in operation three years and The School Buildings Act for two years. It is time for an evaluation.

IV. THE PROBLEM

The problem was to investigate certain issues created for the Edmonton Public Schools by the provincial provisions for the financing and construction of school buildings as specified in the School Foundation Program Fund, The School Buildings Act, and the respective Regulations.

To facilitate the establishment of criteria against which to judge the impact of these Acts and the accompanying Regulations, the following sub-problems were isolated for investigation:

- I. What, if any, were the problems in complying with the terms and regulations of the Acts?
 - (a) Were the requirements restrictive to the local officials who plan the schools?
 - (b) Could the requirements be adhered to without requisitions for further revenue?
 - (c) Was the combined effect of the Regulations causing an extra burden of costs for education in the Edmonton Public School System?
 - (d) Did the plan prevent school-building-program costs from rising?

- (e) How did the Acts and Regulations affect local autonomy in the matter of school building construction?

II. How are the Acts and Regulations evaluated with respect to some of the principles of educational finance?

- (a) Does the scheme conform to the principles of adaptability and flexibility?
- (b) Does the scheme satisfy the principles of economy and efficiency?
- (c) Does the scheme meet the requirements of the principle of local responsibility?
- (d) Is the responsibility for educational services and the authority to finance those services vested in the same agency?

V. THE PROCEDURES

The first step was to collect the relevant legislation, regulations and documents, as indicated in the following list.

1. The School Buildings Act.
2. Regulations pursuant to The School Buildings Act (1963).
3. School Foundation Program Fund Regulations (1963).
4. Grant Regulations (1963).
5. The Alberta School Building Handbook.
6. A circular of the School Buildings Board to Secretary-Treasurers of school districts, school divisions and

counties entitled, "Procedures Respecting Proposed New School Construction Under The School Buildings Act."

7. The "Financial Kit" provided by the Local Authorities Board to school districts.
8. A memorandum, "Re: A By-law Relating to the Issue of Debentures."
9. The Requisition Form for School Districts.
10. The Budget Report Form 1315-23F.
11. The "Statement of Furniture, Equipment and Landscaping Needs" Form.
12. The "Statement of Building Needs" Form.
13. The Capital Budget records of the Edmonton Public School Board.
14. Other forms and files of the Department of Education, Province of Alberta, concerning capital expenditures.
15. Pertinent records of financing and construction in the Edmonton Public School Board offices.

Those Acts, Regulations and various documents relative to the financing and construction of school buildings were analyzed in an effort to infer the possible effects upon the Edmonton Public Schools. This analysis was followed by interviews with various officials of the Edmonton Public School Board and the Department of Education in order to ascertain the actual effects. Examination of official records was used to validate the results of the interviews. These steps were followed by an evaluation of the legislation and its

effects upon the Edmonton Public Schools. Finally, a statement of recommendations and areas for further study was drafted.

The criteria for the evaluation of the legislation and regulations were professional books on educational finance, university studies, theses on the problem of school finance, current periodical literature, official statements of the Department of Education, and official statements of the Edmonton Public School Board representatives.

VI. DEFINITIONS

The following are definitions for some of the terms used in this study.

Adaptability. Adaptability is the ability to adjust to newly developing needs or to new insights into methods of meeting old needs.¹²

Approval (or approved). This term refers to the approval given by the School Buildings Board of any building or portion of any building insofar as the cost thereof is to be a charge against funds available to a school board, or school committee of a county, pursuant to Part F of The School Foundation Program Fund Regulations. The approval does not preclude the school board, or school committee, from exceeding, either in physical extent, or in cost, the approval

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Paul R. Mort, Principles of School Administration (New York: McGraw-Hill Book Company, Inc., 1946), p. 220.

given by the School Buildings Board, but any excess shall not be a charge against Part F of the School Foundation Program Fund Regulations.¹³

A.S.T.A. This means The Alberta School Trustees' Association and its official representatives.

A.T.A. These letters refer to The Alberta Teachers' Association and its official representatives.

Capital outlay. This refers to expenditures for land, equipment and buildings. These expenditures should result in an increase in the total amount of property owned by the school organization.¹⁴

Classroom. A classroom is a room located in a school building for the purposes of pupil instruction and direction in the subject matter of the curriculum.

Department. This term refers to the Department of Education, Government of Alberta, and its official representatives.

District. This means a school district formed or established in accordance with the provisions of Chapter 175 of the Revised Statutes of Alberta, 1942, or any other Act or Ordinance respecting

¹³This definition is used in The School Buildings Act.

¹⁴Foster E. Grossnickle, Capital Outlay in Relation to a State's Minimum Educational Program (New York, Columbia University, Bureau of Publications, Teachers' College, 1931), p. 2.

schools and in force in the Province at any time, including The School Act.¹⁵

Economy. The term means the careful management of resources by means of both careful planning and use in an effort to avoid waste.

Efficiency. This means the production of the desired effects or results with a minimum of effort, expense, or waste.

E.P.S.B. These letters refer to The Edmonton Public School Board and its official representatives.

Financial equalization. This means that those districts least able to finance a program of essential educational opportunities (a foundation program) with local funds receive proportionately more money from state sources than the more able districts. This term should be distinguished from "equalization of assessments" as carried on by assessors.¹⁶

Flexibility. This is the ability to achieve the recognized end with due regard to differences in situations and individuals concerned.¹⁷

Foundation Program. This refers to the educational opportunity that should be available to all regardless of the wealth of the district in which they live. The foundation program may be

¹⁵The School Act, Chapter 297 of the Revised Statutes of Alberta, 1955, p. 1.

¹⁶A. W. Bruns, "An Examination of the Alberta Tax Reduction Subsidy for Education," Unpublished Master of Education thesis, University of Alberta, 1961, p. 14

¹⁷Mort, op. cit., p. 220.

defined in terms of services and facilities as well as costs; it may be defined by law as the number of dollars to be provided in terms of pupils, classrooms, or teachers. In the present study, the term refers to the program of the Province of Alberta.¹⁸

Foundation Program Plan. This plan is the one adopted for facilitating financial equalization. It is designed to assure that each district which makes the required minimum uniform local tax effort will have sufficient funds from provincial, local, and other sources to finance its foundation program. Under this plan the Province undertakes to provide the difference, if any, between the objectively determined yield from the uniformly required minimum local tax effort and the cost of the foundation program in the district. The funds used to support the foundation program are commonly called foundation program funds. The term, in this study, refers to the Alberta program.¹⁹

L.A.B. This refers to the Local Authorities Board and its official representatives.

Local tax. This means any tax levied at the district level on assessed properties for general school operation purposes.

Prudence. Prudence means the capacity to exercise wisdom as the outgrowth of experience. It implies the ability to regulate, to calculate, to employ skill and sagacity in the management of

¹⁸Bruns, op. cit., p. 14.

¹⁹Ibid.

practical matters, and to give due regard to the future.²⁰

Qualifying tax. This tax means the local tax levy required to be made in every district which qualifies for participation in foundation program funds.

School. This means a school, or any classroom thereof, of a district or division established or constituted under the provisions of The School Act.

School building. According to The School Buildings Act, this is a building used for the instruction of school pupils.

School division. In this study the term includes a county or school district. It means a unit of administration constituted according to the provisions of Chapter 175 of the Revised Statutes of Alberta, 1942, or by The School Act.

Simplicity. This means freedom from intricacy or complexity. It is thought that, other things being anywhere near equal, the simpler of two plans is to be preferred.²¹

Trustee. This means a member of a local school board.

VII. ORGANIZATION OF THE THESIS

Chapter I states the background to the 1963 legislation, the purposes and thesis of the study, the need for the study, the statement of the problem and sub-problems, the procedures followed,

²⁰Mort, op. cit., pp. 173 - 174.

²¹Ibid., p. 182.

definitions of some terms, and a brief statement about the organization of the thesis.

Chapter II contains the related literature.

Chapter III is titled, "The Analysis of the Acts, Regulations, Directives and Forms." The School Buildings Act and its regulations, the School Foundation Program Fund Regulations, the Grant Regulations for 1963, the Alberta School Building Handbook (1959), and various forms or directives were analyzed in an effort to estimate their effects on the functions of the E.P.S.B.

Chapter IV is titled, "The Results of the Investigation." In this chapter is a summary of the effects that actually occurred, as they were ascertained by interviews and examination of the records.

Chapter V is an evaluation of the legislation and its effects on the Edmonton Public Schools. Various problems are discussed and the legislation is examined in the light of some principles of educational finance.

Chapter VI, the concluding chapter, contains a brief summary, the conclusions, the recommendations made, and the suggestions for further study.

CHAPTER II

THE RELATED LITERATURE

Many studies of educational finance have been conducted here and abroad since 1900. Men like Mort, Benson, Corbally, Burke, Johns and Morphet have written extensively upon the subject. Studies of the Canadian and Alberta scenes in the form of papers, reports, theses, and dissertations have been completed by Bruns, Dent, Andrews, Hanson, Mowat, Reeves, LaZerte and others. Dent's thesis was "The Evolution of School Grants in Alberta".²² Bruns was concerned with the Tax Reduction Subsidy tried in Alberta in the 1950's.²³ Hanson has made several studies, one of which resulted in an unpublished paper at the University of Alberta entitled, "Educational Finance in Alberta, Past and Future."²⁴ Reeves'²⁵ and Mowat's²⁶ dissertations were both concerned with the

²²Ivor G. Dent, "The Evolution of School Grants in Alberta," Unpublished Master of Education thesis, University of Alberta, 1944.

²³A. W. Bruns, "An Examination of the Alberta Tax Reduction Subsidy for Education," Unpublished Master of Education thesis, University of Alberta, 1961.

²⁴E. J. Hanson, "Educational Finance in Alberta, Past and Future," Unpublished paper dated November 5, 1958, on file at the University of Alberta.

²⁵A. W. Reeves, "The Equalization of Educational Opportunity in the Province of Alberta," Unpublished dissertation, Stanford University, 1949.

²⁶Gordon Leslie Mowat, "A Plan for Recognizing Pupil Transportation Costs in the Province of Alberta for Purposes of the Equalization of Educational Opportunity," Unpublished dissertation, Stanford University, June, 1953.

equalization of educational opportunity. They have both also written and presented other papers on the subject of educational finance. LaZerte's work referred to here is the Report of the School Finance Research Committee, sponsored by The Canadian School Trustees' Association and directed by Dr. LaZerte.²⁷ In addition to the above studies, K. Grant Crawford has published a book titled, Provincial School Grants: 1941 to 1961.²⁸ Each of these contributes something to the total picture of educational finance in Alberta, yet all the problems connected with the subject are not resolved.

Back in 1942, A. A. Gibb had concluded that one of the contributing factors to the existing inequality in educational opportunity was the failure to apportion all new educational grants on an equalization basis. Reeves proposed a plan designed to achieve both equalization of financial aid and educational opportunity.³⁰ These and other studies had been directed to the problem of distributing provincial funds in a manner which would equalize

²⁷Milton Ezra LaZerte, School Finance in Canada, A report of The School Finance Research Committee, The Canadian School Trustees' Association (Edmonton: Hamly Press, Ltd., February, 1955).

²⁸Crawford, loc. cit.

²⁹Allen A. Gibb, "The Setting Up of a Minimum Educational Program in Alberta and an Inventory of the Cost to the Provincial Government," Unpublished Bachelor of Education thesis, University of Alberta, 1942.

³⁰Reeves, op. cit.

local tax burdens for education. The institution of Alberta's School Foundation Program Fund with the thirty-two mill levy on an equalized assessment in all districts appears to have been an attempt by the Government to solve those problems in a practical way.

Mort, Reusser and Polley advocated the evaluation of new methods of financial support.³¹ Since the School Foundation Program Fund and The School Buildings Act make provisions different from the previous grant system, the provisions for school building construction need examination to see how they comply with the principles of educational finance and to see what certain implications for the Edmonton Public Schools may be.

Furthermore, Grossnickle, as far back as 1931, indicated the disagreement among authorities as to the need for equalization for capital outlay purposes.³² Of course, part of his reasoning was that an addition of fourteen per cent to the current operating costs would provide sufficient amounts for capital building if a time factor of twenty-five years or more were considered. Burke, among others, has indicated that although an equalization program may be instituted there is no guarantee that an adequate level of educational opportunity has been provided.³³ He points to the

³¹Mort, Reusser and Polley, op. cit., p. 37.

³²Grossnickle, op. cit., pp. 3 - 4.

³³Burke, op. cit., p. 16.

lack of local initiative, interest, and effort in Delaware and North Carolina as examples of the danger inherent in a high level of state support for weaker units of local educational government.³⁴ He points, also, to the need for providing opportunity for the willing and able to advance beyond the levels acceptable to others.³⁵ In other words, equalization is not necessarily a good thing. Two aspects of a democracy are the dynamic and unequalizing factors and those factors which stabilize or equalize the situation. If either of these is to get out of hand, democracy may be in trouble.

Burke claimed that control over education and educational budgets was one of the most serious problems of school finance in the United States.³⁶ He was concerned with the danger of further centralization, and he claimed that the ratios and percentages used in regulating programs should be the result of educational policy, not that educational policy should be the result of ratios and percentages.³⁷ Furthermore, Burke would prefer to retain the advantages of decentralization while taking the advantages of centralization.³⁸ Certainly, if, as Burke claimed, the problem of financing capital outlay is becoming increasingly critical³⁹

³⁴Ibid., pp. 456 - 462.

³⁵Ibid., p. 561.

³⁶Ibid., p. 21.

³⁷Ibid., p. 575.

³⁸Ibid., p. 18.

³⁹Ibid., p. xiii (Preface), p. 105, p. 109, and p. 114.

and if, as Corbally claimed, capital expenditures in the United States have increased by two hundred per cent since 1940 (to 1962) and are continuing to rise,⁴⁰ there is reason for concern about the matter. Burke and Corbally are Americans and one might be tempted to disregard their concerns as being none of ours; but Hanson's study⁴¹ in Alberta and LaZerte's study⁴² in Canadian affairs, showing increasing expenditures for construction of school buildings,⁴³ should cause us to stop and think. It is not just a matter of rising price levels; it is also a matter of increasing enrolments as the result of high birth rates, immigration into Alberta, and larger family size. There appears to be little likelihood of a rapid decline in demands for school construction while there appears to be a greater need to solve the problems of budget control and state assistance.

Evaluation of the new provisions under the School Foundation Program Fund Regulations and the School Buildings Act needs to recognize the results of previous studies regarding the fiscal dependence or independence of local districts in educational matters. Burke and Mort both report that these studies (in the United States)

⁴⁰John E. Corbally, Jr., School Finance (Boston: Allyn and Bacon, Inc., 1962), p. 225.

⁴¹Hanson, op. cit.

⁴²LaZerte, op. cit.

⁴³See also: S. C. T. Clarke, "The Secretary Reports: School Costs," The ATA Magazine, Vol. 41, No. 7, March, 1961, pp. 63 - 64.

show no significant difference in economy or efficiency for either kind, although independent local districts are more responsive to the rise and fall of the economy.⁴⁴ Where differences did occur, they seemed to favor the independent districts.⁴⁵

The School Foundation Program from the first has been a matter of concern to the A.T.A., the A.S.T.A., and many others, including the editors of newspapers. It is still of concern to these even though the initial resistance caused by the interruption of well-established routines has tapered off by now.

Shortly after the Program was introduced in the Legislature (1961), numerous requests were made of the Government for a hearing. When the hearings opened before the Agriculture Committee of the Legislature, under which educational problems are considered, thirteen briefs were presented expressing fears that the foundation plan would not meet actual costs, that many areas would face increased taxation, that the autonomy of school boards would be further reduced, and that improvement in educational programs would be curtailed if not completely blocked.⁴⁶ The A.T.A. brief, among other points, was particularly concerned about the autonomy of school boards, the probable curtailment of educational improvement, the limits to property taxes, and the reliability of property taxes as an adequate means of taxing wealth. The issue of responsibility

⁴⁴Burke, op. cit., p. 225.

⁴⁵Mort, Reusser and Polley, op. cit., p. 65.

⁴⁶"The Tax Plan Hearings," The ATA Magazine, Vol. 41, No. 8, April, 1961, pp. 4 - 5.

and authority to do the job was also raised.⁴⁷ The A.S.T.A. at a special one-day meeting of urban delegates and representative persons on March 23, 1961, foresaw the need of additional requisitions above the thirty-two mill rate, expressed concern about the transference of the burden of education costs from the Province to the property tax, claimed that the plan might induce a reduction in educational standards, and voiced anxiety about the welfare of local autonomy.⁴⁸ The concern was real enough that in addition to the general A.S.T.A. brief, the Urban Board Representatives were permitted to present their own briefs to the Agriculture Committee hearings. The Urban Boards pleaded for postponement of the program and the opportunity to try cooperatively to resolve the problems they felt inherent in the program.

In the A.S.T.A. urban briefs to the Agriculture Committee of the Legislature in April of 1961, three or four points deserve special attention. The Edmonton School District No. 7 brief of April 4, 1961, said:

Notwithstanding the fact that few appeals were presented to the Local Authorities Board in 1961, the powers vested in municipal councils and the L.A.B. are far beyond their direct responsibility for educational programs. Educational progress is placed in jeopardy unless responsibility for services and power to finance are vested in the same body. Direct action should be taken to rescind

⁴⁷"Submission regarding Proposed Educational Finance Plan," The ATA Magazine, Vol. 41, No. 9, May, 1961, pp. 12 - 15 and p. 69.

⁴⁸"School Finance," The Alberta School Trustee, Vol. 31, No. 4, April, 1961, pp. 2 - 5.

present controls and to provide school boards with authority to requisition for funds in excess of the Foundation Program... If education is not to be financed increasingly on some bases other than the property tax, both the levels and the quality of public education in Alberta will become static, if not decline...Authority to requisition funds in excess of the Foundation Program should be restored to school boards.⁴⁹

Calgary's brief, among other points, added the following:

2. That the foundation program be redefined realistically in terms of its adequacy to meet the present day needs of education; that there be in the grant structure recognition of the great variations in need among the districts and that grants be made in amounts sufficient to support an adequate program, or

That the foundation program be redefined in terms of specific minimum elements, which are mandated by the province; that the grants be sufficient to cover these elements; that the Department designate the program as an absolute basic minimum foundation program; that encouragement be given to all districts to raise the program from minimum to adequate levels.⁵⁰

The bid for postponement was denied, but it is interesting to note two of the resolutions which were presented and carried at the annual trustees' convention and later reported in The Alberta School Trustee magazine.

Resolutions Number

4. Foundation Plan - Medicine Hat No. 76 and Calgary No. 19 - Reimbursement for heavy borrowing costs. - Carried

and

⁴⁹"Submission of the Edmonton School District No. 7 to the Agriculture Committee of the Legislative Assembly, Province of Alberta, Re School Financing Program." Submitted by Chairman R. V. Johnson, April 4, 1961, pp. 1 - 7.

⁵⁰"The Foundation Program," The Alberta School Trustee, Vol. 32, No. 1, January, 1962, p. 13.

7. Taxation for Education - Edmonton Public No. 7 - Requesting Government to assume a larger proportion of education costs and to provide a broader tax base. - Carried.⁵¹

On March 27, 1961, an editorial in The Albertan⁵² raised the following points. The Albertan gave two credits to the foundation program as proposed. First, the Editor approved of any measure which tried to achieve equality of educational opportunity for all children in the Province. Second, there was approval of the fact that the tax base had been broadened to an extent by making provincial property, municipal property, and utility lines subject to taxation for school purposes. The Albertan listed, too, four points of concern. That educational finance still depended to too great an extent on real property taxes was one concern. There was still a need to tax a source which better recognized the taxpayer's real ability to pay. The second concern was that although the principle of equalization was a good thing, there was a danger in a formula which appeared to equalize downwards for some and perhaps all areas in Alberta eventually. The argument was that if the quality of educational provision was to be poorer than it had been in some districts (as it appeared it might be among some wealthier districts) then there was a cumulative effect which would spread the poorer

⁵¹"Convention Summary," The Alberta School Trustee, Vol. 31, No. 10, December, 1961, p. 5.

⁵²"Yardstick for Education Plan," Editorial, The Albertan, March 27, 1961. (Reprinted in The ATA Magazine, Vol. 41, No. 8, April, 1961, pp. 16, 17 and 62.)

quality throughout Alberta. Third, the loss of local autonomy, as indicated by the Province determining local tax rates and by the Province determining how the revenues were distributed, was a defect. In regard to local autonomy, The Albertan said that local autonomy is

...essential if parents are to retain any real control over the educational process and if educational practice generally is not to be pushed by excessively centralized departmental direction and regulation into the rut of conformity.⁵³

In fact, the Editor said, if requisitions to cover "unapproved costs" were referred to municipal councils who in turn referred them to the Local Authorities Board for a decision, who, then, were the responsible persons determining the program? Finally, The Albertan pointed out that although the Government claimed that the Program would cut costs, nobody had cited exactly how the plan would accomplish this, even when specific requests had been made to do so.

The April (1961) issue of The ATA Magazine carried a brief report of the proposed education finance plan from S. C. T. Clarke, the Executive-Secretary of the A.T.A., to the membership at large. He designated the "approved" costs as "provincial average costs" and claimed that two of the most disturbing elements were the danger of the plan placing a lid or ceiling on educational expenditures and the transfer of control over educational expenditures from the local board to other authorities of the Government.⁵⁴

⁵³Ibid.

⁵⁴S. C. T. Clarke, "The Secretary Reports: Proposed Education Finance Plan," The ATA Magazine, Vol. 41, No. 8, April, 1961, p. 63.

Justice demands that the advantages of the plan, as viewed by the Honorable A. O. Aalborg, the then Minister of Education, be presented. In an address delivered in the Legislature on Monday, February 27, 1961, he cited six specific points. First, there would be a better distribution of the costs of education borne by the ratepayer. Second, he claimed that the plan provided a means of controlling spiralling costs. Third, the plan would provide a good standard of school service in all parts of the Province. Fourth, there was to be full equalization of financial support. Fifth, the uniform mill rate of thirty-two was subject to further increase if costs continued to rise, while the reverse was true in the event of falling costs, and sixth, the autonomy of local boards was preserved as they were free to requisition for additional monies.⁵⁵

When the idea of the School Foundation Program Fund was first introduced, the Honorable Mister Aalborg was aware that others held different opinions about the plan. During an address to the 1961 A.S.T.A. Convention he said:

A program as large in scope and as far-reaching in its effects as the Foundation Program cannot be fully and fairly assessed on the experience of one year alone. This can be done only after the Program has been in operation for at least two or three years.⁵⁶

⁵⁵"School Finance," The Alberta School Trustee, Vol. 31, No. 3, March, 1961, pp. 2 - 3.

⁵⁶A. O. Aalborg, "Address to the 1961 A.S.T.A. Convention," The Alberta School Trustee, Vol. 31, No. 10, December, 1961, p. 16.

The third year of operation under the Program was 1963.

The Executive-Secretary's Report in the May (1963) issue of The ATA Magazine says:

...the problem of financing increased education costs is a problem which must concern everyone...We need to know what effect the present foundation plan is having on education.⁵⁷

The same report indicated that the A.T.A. was undertaking studies to examine present and predicted educational expenditures in Alberta, and, (jointly with the A.S.T.A.) to study urban-rural patterns of educational expenditures.⁵⁸

Apparently there were practical problems, too, which might indicate the need for a study of the effects of the legislation. C. G. Jewers in an article designed to advise school boards upon proper procedures had this to say:

From time to time, the Minister has received strong protests at the action of the Board (The School Buildings Board) in accepting one tender rather than another. Such protests not only create strained relations between school boards and contractors, but also cause delay in often urgent construction.⁵⁹

The March 13 issue (1963) of The Edmonton Journal carried the news that the provincial School Buildings Board had suggested a number of possible ways to reduce the projected debt of the

⁵⁷S. C. T. Clarke, "Executive-Secretary's Report," The ATA Magazine, Vol. 43, No. 9, May, 1963, p. 25.

⁵⁸Ibid.

⁵⁹C. G. Jewers, "Recommendations Respecting Acceptance of School Building Tenders," The Alberta School Trustee, Vol. 33, No. 3, March, 1963, p. 9.

Edmonton Public School Board.⁶⁰ If Edmonton needed these buildings, then, this report, too, would indicate another reason for investigating certain issues created for the Edmonton Public Schools by the provincial provisions for the financing and construction of school buildings as found in the School Foundation Program Fund, The School Buildings Act, and the accompanying Regulations or directives.

⁶⁰"School Construction Set at \$4,769,000: Province Airs City Program," The Edmonton Journal, March 13, 1963.

CHAPTER III

THE ANALYSIS OF THE ACTS, REGULATIONS

DIRECTIVES AND FORMS

The plan of attack is to analyze the Acts, regulations, directives, and forms in order to develop a set of questions which will form the basis for the interviewing of officials of the E.P.S.B. and the Department. The results of the interviews, along with the evidence from the examination of the records, can then be used to determine certain issues created for the E.P.S.B. by the provincial provisions for the financing and construction of school buildings. The evaluation will be in terms of the sub-problems with which the study began.

This chapter consists of the preliminary analysis.

I. THE SCHOOL BUILDINGS ACT AND THE REGULATIONS

The School Buildings Act requires the approval by the School Buildings Board of any school building project which comes under the terms of The School Foundation Program Fund Regulations established pursuant to Subsection 7 of Section 304a of The School Act. This board consists of three members appointed by the Lieutenant-Governor-in Council, and for each member there is an alternate designated to act in his absence.

The Act demands that a local board provide the School Buildings Board with: (1) information regarding the necessity of the proposed construction or purchase, with the relative information concerning existing and available facilities,⁶¹ (2) information regarding the nature and suitability of the proposed construction or purchase, and (3) information as to the method of financing, whether by borrowing or otherwise.

Authority exists in the Act to regulate the school building project, including such things as the preparation and development of the site, the service connections, a water system, sewage disposal, the furniture, and the fixtures relative to the project.

The Regulations provide for a limit to the approval which may be granted according to different purposes or different sizes of the school buildings proposed. The legislation specifically states that when the School Buildings Board grants approval for a project a local board may go beyond the physical extent or cost of the project approved but that there shall not be a charge under Part F of the School Foundation Program Fund Regulations.

What effect results from the need to gain the approval of the Board? Is one result a psychological or actual "lid" on the amount that a local board will spend, even though more might be preferred or essential to efficient services? Have projects been reduced or stopped entirely in order to avoid the supplementary

⁶¹This information is required on two forms: The Statement of Building Needs and The Statement of Furniture, Equipment, and Landscaping Needs.

levy? Does the local authority know before the detailed plans have been submitted to the School Buildings Board whether the costs anticipated will be approved or unapproved costs? Does the local board experience difficulty in forming an accurate assessment of probable expenditures for budget purposes? Are there extra costs arising from the need to revise plans and structural designs until they meet the approval of the School Buildings Board? Is there a duplication of costs in time and money resulting from the fact that the work of the E.P.S.B. officials, a group of qualified architects, finance experts, planning officers, and educational leaders, must have the approval of the School Buildings Board before any money from the Fund can be applied to a specific project?

The Regulations attempt to recognize the differences in need for elementary, junior high and senior high school pupils by means of "equated pupil" ratios. The "equated pupils" are related to actual school enrolments as follows:

For each elementary pupil, 1.00 equated pupil;

For each junior high pupil, 1.15 equated pupils;

For each senior high pupil, 1.30 equated pupils.

The matter of equated pupils bears directly upon what may be approved costs in the following ways.

For schools up to and including ten home rooms, or 290 equated pupils, approval is limited to functional areas. That is,

approval is limited to the sum of the areas of all classrooms, corridors, offices, washrooms, et cetera, measured to the inside faces of walls and partitions, including cabinets in the measured areas. Crawl, duct, or attic areas are not included.

When the school involves more than ten home rooms, or 290 equated pupils, sixty square feet of functional area for each additional equated pupil may be approved. Rather interestingly, 261 to 290 equated pupils are allowed ten classrooms of 750 square feet each,⁶² which means twenty-six to twenty-eight square feet per pupil. If there is an excess above 290 equated pupils and there is an allowance of sixty square feet per pupil for each extra student, is there a tendency to build classrooms designed to hold more than twenty-nine pupils each? The conclusion reached in the Alberta Teachers' Association Research Monograph No. 6, "Trends in Class Size in Alberta Schools, 1960 - 1962," is that "there has been a persistent trend to larger classes in Alberta schools over the past three years."⁶³ The results in the A.T.A. study, Research Monograph No. 5, "The Effect of Class Size and Teacher Qualifications On Achievement," indicate that city AB

⁶² Schedule A, attached to the Regulations Pursuant to the School Buildings Act, Province of Alberta, April, 1962.

⁶³ Donald B. Black, "Trends in Class Size in Alberta Schools, 1960 - 1962," Research Monograph No. 6, The Alberta Teachers' Association, Edmonton, April, 1963, p. 3.

with smaller class sizes than city CD⁶⁴ consistently had a higher academic success at the grade IX final examinations.⁶⁵ What is the E.P.S.B. policy regarding class size, and regarding the size of classrooms?

A local board is required to submit a table of information to the School Buildings Board regarding the anticipated enrolments, including those for adjacent areas and the already existing facilities.⁶⁶ The Board requires that they be satisfied as to the reasonableness and accuracy of expected enrolments. In rural areas or in smaller centers this may be a reasonable requirement because the anticipated enrolment is likely to be realized, but this same requirement may not be realized in a rapidly growing city in which a city council can re-zone a district from one-family dwellings to multiple-family dwellings, or vice versa, before the school is completed, or where an unexpected number of children move to districts other than those expected. There may be a need in the city to allow for rapid revision of initial plans. Is this possible when local board revisions also need the approval of the School Buildings Board before they can be implemented?

⁶⁴S. C. T. Clarke and Sandra Richel, "The Effect of Class Size and Teacher Qualifications on Achievement," Research Monograph No. 5, The Alberta Teachers' Association, Edmonton, April, 1963, p. 17.

⁶⁵Ibid., p. 10.

⁶⁶The Statement of Building Needs, op. cit.

The Board will not approve non-instructional areas exceeding thirty-five per cent of the functional area in other than junior high, senior high, or junior-senior high schools of eight home rooms or more, and in the latter schools will limit approval to forty per cent. Does this handicap or help a city school board? Does it create or eliminate problems in attempting to build a school of two or more stories? This could be an important consideration when land in a city can cost thousands of dollars per acre, and in view of the stipulation that the Board shall not approve costs applicable to a construction project in excess of \$14 per square foot of approved gross area or the actual cost per square foot of approved gross area, whichever is the lesser. (Gross area is that area within the outside faces of enclosing walls.) When the cost is less than \$14 per square foot, the Board may approve an amount not in excess of \$1.00 per square foot of approved gross area for the purchase of school furniture or equipment and for landscaping, but in no case shall the total cost exceed \$14 per gross square foot of approved area.

What effect has the limit of \$14 per square foot upon the city's public school board? Do normal building costs approximate \$14 per square foot without including furniture, equipment, and landscaping needs? Is it possible that rural costs are not so high for labour and supplies, thus permitting more of the costs for furniture, equipment and landscaping to be included in the approved category?

The term "construction project" includes site preparation and development, erection of a building, including fixed and built-in equipment, service connections, and architect's fees, but it excludes water supply and sewage disposal systems. It may also include any major alterations, reconstruction, or conversion at the discretion of the Board, and the Board shall determine the gross area which may be approved.⁶⁷ On what basis can a school board or the School Buildings Board decide what the gross area may be? Is there ever a conflict in interpretation between the city's board and the School Buildings Board?

The Board may approve an amount not to exceed \$2 per square foot applied to the total home room area for the provision of water supply and a sewage disposal system. Amounts of \$4 per square foot of industrial arts area, \$2 per square foot of home economics area, \$5 per square foot of commercial area, \$1 per square foot of science area, and \$6 per square foot of language laboratory may also be approved.

Where a junior, junior-senior, or senior high school of eight or more rooms is involved, an additional 450 square feet for science teaching space may be added to a second home room, and an additional 750 square feet each may be added for a library and for a business education area. What happens in a high school of thirty home rooms or more? Would two science rooms only be allowed?

⁶⁷Section 6(a), The School Buildings Act Regulations.

If so, a science class might be in a laboratory twice a week or less, which might be an inadequate amount of time allowed for science laboratory education.

For each home room offering instruction to grade I, or grades I and II combined, an additional 150 square feet may be approved.

For a junior, junior-senior, or senior high school only, an additional ten per cent may be added to the gymnasium, stage and storage area. Fifteen per cent may be added to the industrial arts area, and for those schools of eight home rooms or more an additional 150 square feet may be added for a counselling room. In all types of schools in multi-storey buildings up to 250 square feet per storey for each stairwell will be allowed in addition to the functional area. For senior high schools only of ten or more home rooms up to 900 square feet may be approved for a language laboratory. Do these provisions provide adequate gymnasium space for schools of 700 pupils, 1200 pupils, or more? Are the provisions restrictive, or not, for these bigger schools? What happens if a board wishes to build an elementary-junior high school of twenty-four home rooms, in which twelve home rooms are for the junior high students? What would be the effect if a local board wished to design a school in which the stage (as in theatre-in-the-round) were to be separated from the gymnasium? How adequate are these provisions with respect to dressing rooms, storage space for dramatics and physical education, or for standard-sized gymnasiums?

Do the limits on non-instructional areas limit unduly the width of hallways; the provision of showers or toilet facilities;

the provision of "mud-rooms", entrance rooms, playrooms, or waiting rooms; the provision of office space for administrators; or the storage space for school supplies? Is there provision for offices for student counsellors, physical education teachers, or subject coordinators in the larger schools? Is there provision for a staff room or toilet facilities separate from the students?

Schedule A of the Regulations, as shown in Table I, page 41, gives a brief summary of the regulations.

A special section of the Regulations states that a grant not to exceed one hundred per cent of the expenditures made for vocational training projects may be made if the project has been approved by the Department of Education and by the Department of Labour of Canada, pursuant to the Technical and Vocational Training Agreement.

The original School Buildings Act of April 5, 1962, has been revised to permit the School Buildings Board to exercise a discretionary power that it did not, apparently, possess previously. The rules had been quite precise but Part II, Section 8, of the new Regulations makes it clear that the Board now has this power. The Board may decide the necessity for and the size of any area which a local board may propose as a project. The discretionary powers are also extended to decisions regarding the necessity of any equipment proposed and the cost of it. When a project is not covered by the Regulations, approval is entirely at the discretion of the Board.

TABLE I

SCHEDULE A

		<u>Basic Areas</u>			<u>Supplementary Areas</u>			
No. of Equated Pupils	Class- rooms at 750'	Homeroom Classroom Area	Locker Porch & Corridor	Office Wash- room and Storage	Furnace	Science Lib- Add to 1 Clrm.	Gym & rary Storage	Stage Bus. Educ. and Med. Staff
15-32	1	750		100				
33-55	2	1500		200	100			
56-80	3	2250		150	100			
81-100	4	3000		150	150			150
101-135	5	3750		150	250	450	2400	150
136-170	6	4500		150	300	450	2400	150
171-200	7	5250		150	350	450	2800	200
201-230	8	6000		150	400	450	2800	200
231-260	9	6750		200	450	450	3200	300
261-290	10	7500		200	500	450	3200	300

As Supplementary Areas Add: (for 8 or more classrooms)

For Industrial Arts - 2000 square feet

For Home Economics - 1200 square feet

For a General Purpose Room - 900 square feet

The approval of the Board shall be in a form showing: (1) the gross and functional areas approved; (2) the total cost or amount which shall be charged to the School Foundation Program Fund pursuant to Section 5 of Part II; and (3) the total cost or amount which shall be charged to the School Foundation Program Fund pursuant to Section 6 of Part II.

II. THE SCHOOL FOUNDATION PROGRAM FUND REGULATIONS

For purposes of economy, and in order to stay within the purpose of this study, only those sections of the School Foundation Program Fund Regulations which apply to the Edmonton Public School System building costs are referred to in this analysis.

The Regulations state that the total sum payable in any year to a district shall be paid in four instalments payable on or about April 15, June 15, October 15, and December 15. Annual sums shall also be paid by the four instalment method but provision is made for interim payments.

The Regulations require that a district shall submit to the Department of Education at the request of the Minister claims setting forth its entitlement under these regulations, which claims shall be subject to checking and verification by the Department. These claims are to be made on Department of Education forms and attested to by a statutory declaration taken by the secretary of the district.

The Minister is empowered to interpret these regulations and any interpretation made by him shall be final. In respect of matters not specifically provided for under these regulations, the Minister shall take such action and make such decisions as appear to him proper and equitable under the circumstances.

Schedule A, Part A, of the Regulations is concerned with instructional costs. Parts B and C, previously concerned with the Maintenance of School Plant and Instructional Aids and Materials respectively, do not apply in 1963. Part D concerns the Transportation and Maintenance of Pupils, while Part E applies to Administration Costs.

Part F is the section with which this study is concerned. It is the section of the Regulations applicable to Debt Retirement and Capital Expenditure.

The Regulations state that there shall be determined each year a sum computed by multiplying the average numbers of elementary, junior high, and senior high school pupils enrolled during the year, as indicated by the pupil counts made for the purpose of Part A, by amounts respectively of \$40, \$55 and \$65, and adding the three products.⁶⁸ The sum arrived at shall be paid to the districts for debt retirements, including the actual expenditures made by the district in respect of debenture obligations, principal and interest, due and payable during the year, exclusive of any such obligations

⁶⁸At first, the allowance was \$47 per pupil at each level of elementary, junior high or senior high school education.

arising from debenture indebtedness incurred during 1961 or subsequently for the purpose of building or purchasing offices, garages, warehouses and residences, or the purchasing of land, buses or other vehicles, or the prepayment of public utility services. Costs incurred during 1962 or 1963 for areas which were in excess of those approved by the School Buildings Assistance Board or the later School Buildings Board are specifically excluded from being paid with School Foundation Program Funds.

Since money from the Fund may not be used for the construction or purchase of such essentials as offices, warehouses, land, or other necessary items for the efficient operation of the Edmonton Public School District, how are these items paid for? Must the local board make a supplementary levy against the school supporters?

Concerning short term capital loans, the same regulations as for debentures apply.

Should the sum calculated under Part F of the regulations exceed the amounts required for debt retirement and short term capital loans, the difference shall be a credit which may be used by the district in one or more ways. In the current year it is to be applied first towards the cost of any building insofar as it has been approved by the School Buildings Assistance Board or the School Buildings Board, and the furnishing thereof, but any such amount shall not be used for the purchase of land; the erection of offices, garages, warehouses, or residences; the maintenance of existing facilities; the purchase of school buses or other vehicles;

or the prepayment of public utility services or operational expenses. In a subsequent year, the difference may be applied towards the cost of construction of any project approved by the School Buildings Assistance Board or the later School Buildings Board, and any amount standing to the credit of the district shall be applied first towards any such project. After meeting the requirements stated above the residue may be used according to certain stipulations. Eighty per cent of the residue may be applied to the year 1962, sixty per cent to the year 1963, forty per cent to 1964, twenty per cent to 1965, and none to 1966 costs.

Provision is made also for a district which has no debenture indebtedness. In such a case the district may, with the consent of the Minister, use in any year up to fifty per cent of its entitlement under Part F for any current purposes. The remaining percentage shall be applied: first, towards the costs of construction incurred in that year in respect of any building project or projects approved by the School Buildings Board; second, towards the repayment of any short term capital loans applicable to such project or projects; and thereafter to be applied to the cost of construction of any approved project in a subsequent year. The Minister shall, in determining the percentage, not to exceed fifty per cent, for current purposes, have regard to the amount actually required for the year, or in prospect of being required during the next five years in respect of building projects, or the repayment of loans in respect of building projects.

The Regulations empower the Minister to apply any credit of the district under Part F of the Foundation Program Fund Regulations to the payment for any project approved by the Department. The Regulations further empower the Minister to provide more assistance from the Fund to the district for an approved project in the event that the sums calculated to be received on the equated-pupil basis are insufficient in any year to meet the obligations of the district, but any such amount standing to the credit of the district shall be first applied.

The provisions consistently exclude School Foundation Program Funds from being used to pay for unapproved costs, yet the way in which the Acts and Regulations are written forces the district to have unapproved costs unless the School Buildings Board exercises its discretionary power to approve projects beyond the scope of the written regulations.

III. THE GRANT REGULATIONS: 1963

Section 6 of the Grant Regulations is the only section which refers to the costs of construction of a school in the public school system of Edmonton. Under Section 6, there shall be paid a grant equal to one-third of the cost of each item of approved permanent equipment purchased by the board of a district or division for the teaching of science, art, music, physical education, agriculture, industrial arts, home economics, and commercial and technical

electives, and including projectors and radio receivers and such other pieces of instructional equipment as may be approved by the Minister. With respect to equipment for the teaching of science, no grant will be paid for any item costing less than ten dollars. Section 16 states that these grants shall be paid upon receipt by the Department of Education of such certified returns as may be required.

IV. THE ALBERTA SCHOOL BUILDING HANDBOOK: 1959

The first paragraph in the Alberta School Building Handbook reads as follows:

The suggestions herein contained are intended to facilitate cooperation between the Department of Education, local school authorities, architects, engineers and contractors, in an endeavour to secure, with reasonable economy, the best educational facilities.

Twenty-four sections detail what can be done, or should not be done, when the project is not subject to applicable provisions of The National Building Code of Canada, local by-laws, and provincial or federal regulations. In the beginning there are statements regarding the responsibility for structural or mechanical soundness, orientation, landscaping, provision for future expansion, and provision for community use, but after that there are detailed directions for everything from ceiling heights to the size of room permitted for conference purposes. Some of the topics concern footings, entrances, interior and exterior doors, fenestration, corridors, stairways, painting and finishing, chalkboards, acoustics, television

provisions, instruction rooms, storage space, office provisions, gymnasiums, and service systems. Initially, the reaction is that there is little, if any, leeway for a local board in designing its own building, particularly with provisions like the limits of thirty-five per cent or forty per cent of the functional area for non-instructional purposes, as prescribed in Part II, Section 4, Items (a) and (b) of the Regulations pursuant to the School Buildings Act. Still, the provision of the Regulations, under Part II, Section 8, permits the School Buildings Board to use its discretion in ruling upon that which will be approved or not approved, which means that the provisions in the Alberta School Building Handbook are not so hard and fast as it might seem initially.

V. THE CIRCULAR TITLED,
"PROCEDURES RESPECTING PROPOSED NEW SCHOOL
CONSTRUCTION UNDER THE SCHOOL BUILDINGS ACT"

The circular, dated April 16, 1962, was distributed to the secretary-treasurers of school districts, school divisions and counties. It listed the personnel of the School Buildings Board as being:

Dr. J. W. Chalmers, Department of Education, Chairman;
Mr. J. F. Hunt, Department of Public Works, Vice-Chairman;
Mr. F. G. Stewart, Treasury Department, Member;
Mr. J. M. Currie, Treasury Department, alternate to Mr.
Stewart;

Mr. U. R. Shogren, Department of Education, Secretary and alternate to Dr. J. W. Chalmers.

The memorandum lays down the procedure to be followed in meeting the requirements of the Board. A summary follows.

After the local board, with the advice of the superintendent and principals, has decided upon the projects to be undertaken, they should consult with the Municipal Council and the Planning Commission for the area regarding a site and the closing of any streets or lanes. Next, a "Statement of Building Needs" on the proper form is to be forwarded, in triplicate, to the School Buildings Board. The statement should be sent with a sketch plan. From this statement and sketch plan the Board will decide whether or not the need has been recognized for any, all or none of the proposed construction. The Local Authorities Board will not issue an order to any school board authorizing a borrowing by way of debenture until it has been advised by the School Buildings Board that it recognizes a need for the purposes set forth.

The local board is advised to employ a registered architect to prepare the sketch plans and to estimate the cost if the school is to contain more than three rooms for the teaching of general or special subjects or if it contains a gymnasium or auditorium.

Three copies each of sketch plans and the architect's estimate of cost together with information regarding probable costs of site, landscaping, service connections, furniture, equipment, and

architect's fees should be sent to the School Buildings Branch of the Department of Education for approval. If the sketch plans are approved or if revisions are required, the school board will be notified by the Department. These requirements are in addition to the Statement of Building Needs.

The total estimated cost is to include the amounts to be used from reserves, current revenue, surplus under Part F of the School Foundation Program Fund, capital borrowing under Sections 233 and 234 of The School Act, proceeds from the sale of capital assets, proceeds from fire insurance, and capital borrowing by way of debentures authorized by the Local Authorities Board. If the local board intends to seek debentures, it is advised to follow carefully Section 169, Section 228, and Sections 236 to 276 inclusive of The School Act. If and when the Local Authorities Board issues an order authorizing the school board to borrow by debenture, it will send the school board a copy. The Alberta Municipal Financing Corporation will handle all applications to sell debentures in the initial stages; the Department of Education will continue to process the actual debenture and to complete the transaction in the final stages.

Two complete sets of final plans and specifications should be sent to the School Buildings Branch for examination and approval. This requirement applies also to revised plans or addenda to specifications.

After the final plans and specifications have been approved by the Department of Education and financial arrangements have been authorized or approved, tenders may legally be called. The local board should issue four advertisements calling for tenders, at the rate of two issues per week in the daily newspapers, and have at least one advertisement in any local paper. After the previously advertised period of time for receiving tenders has expired, at a regularly called meeting of the school board, the tenders shall be opened and considered. The tender, or tenders, which the board wishes to accept, together with a list of all other tenders received, should be forwarded to the Department of Education for inspection and Ministerial approval.

Following the Ministerial approval of the tender, or tenders, the construction contract must be prepared in triplicate, and the three copies, together with the contract bond, must be forwarded to the Department of Education for examination and approval. When the construction contract has been approved, the work may commence. Three copies of any change order issued subsequent to approval of the contract should be submitted to the School Buildings Branch for examination and approval. Under Section 227 of The School Act, the construction of a school must be by contract. Where day labour is used, the requirements of Section 229 must be followed.

When the construction has been fully completed and the architect has issued a final certificate, the Department of Education

must be notified so that it may direct a school building inspector to inspect the project and certify completion to the School Buildings Board. Where possible, a school building inspector from the Department will inspect each building during construction and give reports to the Department, the school board, and its architect. The school board must notify the Department of the steps taken to correct any reported defects.

Finally, two warnings are included in the memorandum. One is to keep a careful and complete record of costs for each project so that complete information can be supplied to the School Buildings Board and to the Department of Education when required. The other is that for both the sketch plans and the final plans it is important that the floor plans show the name, square footage, and exact dimensions of each functional area.

VI. THE FINANCIAL KIT ISSUED

BY THE LOCAL AUTHORITIES BOARD

The kit contains a number of forms to be completed regarding the financing of proposed projects.

One of the forms is titled, "IMPORTANT, Re: A By-law Relating to the Issue of Debentures, (Section 235 of The School Act)." This form specifies the precise form and wording of a by-law. The by-law should state such things as the amount of land to be purchased, the cost of the land, the landscaping costs, the type of building to be erected, the number and kinds of rooms, the

estimated cost of the building, including architect's fees, the water supply and sewage disposal system costs, the estimated cost of furniture and equipment, and the proposed site or location of such project. Each project must be detailed separately. The source of all funds to be used for a project and the respective amounts are to be stated relative to each item.

Two copies of the by-law together with two statements of particulars (Form 1315-235 and Form 1315-235A) shall be forwarded to the Department.

Form 1315-235 is a form upon which the local authorities are to state "the estimated source of funds" and "the estimated application of funds" for a project. Sources are designated as debentures issued by the Municipal Financing Corporation or otherwise, loans, current revenue, surplus funds under Part F of the School Foundation Program Fund, reserves, sale of fixed assets, insurance recoveries, grants from the Federal Government or otherwise, gifts and donations, unexpended funds (surplus capital), or other. The estimated application is distributed under the headings of land purchase, site development, construction contracts, architect's fees, furniture and equipment, water and sewage, prepaid utilities, and contingencies. Over-expenditure, from previous years, must also be accounted for. As indicated previously, the total estimated source must agree with the total estimated application of funds.

Form 1315-235A is a summary form of estimated source of funds and estimated application of funds when several projects are proposed.

Included in the kit is a "Requisition Form For Counties and School Divisions, Form 1315-225" for use when requisitions for further monies need to be made from several municipalities by one school authority. "Requisition Form for School Districts, Form 1315-226" serves the same purpose when a school district has need to requisition from more than one municipality.

Also included is a Budget Report Form which a county, school district, or school division must submit in duplicate to the Department of Education. This form requires a detailed analysis of estimated revenue sources and estimated expenditures in all aspects of finance for that school authority. Page 4 is devoted entirely to "Debt Retirement and Capital Expenditure". Total pupil allowances at the \$40, \$55 and \$65 rates, total claims made under Part F of the School Foundation Program Fund Regulations, total capital loans, total charges ineligible under Part F of the School Foundation Program Fund Regulations, and the specific capital expenditures out of current revenue are required. The Budget Report Form also requires that the interest charges on bank loans or current loans be listed and totalled. From this form the Department of Education has detailed information regarding the finances of any school authority in the Province.

Other forms, chiefly directing the local authority in correct procedures to follow in promoting a debenture or indicating the correct form for notices or by-laws, are included in the financial kit. Other than for their value in resulting in a debenture being issued, they affect little the problems under consideration in this study.

SUMMARY

The Department of Education through the School Buildings Board and the Budget Report Form exercises a control over any building project proposed by a local authority. The financial side of the project also has a check through the Local Authorities Board. The actual construction is watched by the Department's building inspectors. The School Buildings Board checks and approves or rejects the project from the initial planning all the way through to the turning over of the completed building to the local authority.

Innovation, new designs, or different approaches to the utilization of floor space are all subject to the discretionary decisions of a Board composed almost entirely of non-educators. There are no teachers, principals, vice-principals, nor superintendents of counties, divisions or districts on the Board, yet these people, regularly in the classrooms, should be among those who could visualize improvements or desirable experiments for the more efficient business of teaching.

Undoubtedly there are districts, divisions, or counties which need the advice, leadership, and control of the Department of Education, particularly if board members are new and the administrators inexperienced. Yet, where a school system, such as the Edmonton Public School Board, employs experts in financing, architecture, administration, supervision, and teaching, and where separate well-organized departments operate under a system of balances and checks to arrive at efficiency of operation, the necessity for the Department of Education to maintain a close control and check on every detail of school building construction seems to be unnecessary. It may also be retarding the educational leadership which a city the size of Edmonton could and should supply to the Province of Alberta. There is room for the development of school building designs admirably suited to the variations of climate similar to ours. There is a need for buildings designed to match and supplement the school programs which are and will be developing to meet the needs of students.

It may be well to heed the warning of H. L. Bouey, an architect in Edmonton frequently involved with designing school buildings, when he says:

The growing spread of government control on all phases of activity is a serious detriment to freedom in design and to ideas related to a new philosophy of school construction. As an architect, I would urge the other members of the planning team to guard carefully the area where freedom still exists and to expand this area wherever possible.⁶⁹

⁶⁹H. L. Bouey, "The Role of the Architect in the Planning of Schools," Proceedings: National Conference on School Architecture, March, 1962, Department of Extension, University of Alberta, p. 7.

The key questions raised in this chapter may be summarized as follows:

1. Have the limitations and specifications imposed by the Department of Education resulted in any phase of the building plans of the E.P.S.B. being reduced or curtailed?
2. Has the legislation resulted in an increase in class size, which might result in a lowering of academic achievement?
3. Does the Department of Education pay one hundred per cent of the school building construction costs of the E.P.S.B.?
4. Have special concessions, through the exercise of the discretionary powers vested in the School Buildings Board or the Minister of Education, been made to the E.P.S.B.?
5. Has the legislation kept the costs of school building construction from rising?
6. Is it possible, under the present laws, regulations and directives, to construct a satisfactory and aesthetically pleasant school building?
7. Do the provincial government rules handicap or help the planning officers and the architects in the planning, designing and completion of a school building?
8. Is budget estimating or budget control made more difficult by the laws and regulations concerning school building construction?
9. How do the regulations and laws appear in the light of certain principles of control and financing?

CHAPTER IV

THE RESULTS OF THE INVESTIGATION

The aim of the study was to determine certain issues created for the Edmonton Public Schools by the provincial provisions for the financing and construction of school buildings. In the previous chapter, the legislation and related items were analyzed to see what the effects might have been. The analysis was to serve as a guide for the investigator. A number of questions were raised to be used in the investigation (by means of interviews and by examination of official records).

This chapter is a report on the results of the investigation.

I. THE SCHOOL BUILDINGS ACT AND THE REGULATIONS

The major discovery is that the legislation, the regulations, and the School Building Handbook are now in the process of being revised in order to overcome some of the problems or deficiencies discovered in practice. Particularly, Schedule A of the School Buildings Act Regulations has some items which are too restrictive or difficult to implement. One of the problems with the Schedule has been its inadequacy insofar as larger schools and new ideas were concerned. Fortunately the Minister of Education and the School Buildings Board have been able to exercise the discretionary powers vested in them by legislation. According to officials at the Edmonton Public School Board offices, the decisions of the School Buildings Board, or the Minister, have been fair and reasonable.

On occasion something has initially been rejected in the plans but later approved after the need had been justified by logical argument or demonstration of need. Of course, not everything proposed by the E.P.S.B. has received approval. Some ideas may be good but, from a provincial government point of view, perhaps too costly because the implementation of them in one area of the Province could mean the same costs being added in all other districts, divisions or counties in Alberta. Furthermore, space has to be utilized for the majority of the school day in order to warrant the costs. Since the Government guarantees the payment of one hundred per cent of the debenture charges for eligible debts, there is need to consider the ramifications on a provincial basis.

One thing ascertained by interviews with local personnel was that many of the concerns of E.P.S.B. officials about the interpretation of regulations and directives or about the implementation of ideas not allowed for in the legislation have been resolved by casual and amicable means, frequently by unofficial discussion over the telephone or by meetings between officials of the E.P.S.B. and the Department of Education. An illustration of the results might be the use of Modern-fold Soundmaster 240 doors in Wellington Junior High School in order to provide spaces suitable for team teaching needs. Another example might be the design differences in Avalon Junior High School, a proposed laboratory school where, for one thing, a four-way partition of folding doors will be tried. The new Harry Ainlay School is to have a dual purpose room for

either dramatics or team teaching purposes. As far as meeting the requirements for science or physical education facilities in our large city schools is concerned, there seems to have been adequate and just provision without providing more than any other district would be entitled to under similar circumstances. As one local official stated, there would never be enough provided if you granted everything desired by teachers and administrators in the way of facilities or equipment; there will always be things which people would like to have but which do not have the support or justification which other items warrant. No matter what the controlling body is, somebody has to decide upon the permissible limits.

What, then, were the items of concern for which Schedule A of the Regulations proved inadequate?

The first of the inadequacies was the provision of 750 square feet for city classrooms. There seem to be two reasons for criticism. First, the city officials have planned for 35 to 40 pupils per room, which would have meant about 21.5 square feet per pupil and below the standards being provided in other places. Second, city classrooms seem to be built with more shelving, cupboards, and cubbyholes for students than are non-city schools. The School Buildings Board has been approving city plans for classrooms of 800 to 850 square feet, or about 23 square feet per student. In all areas of the Province, 850 to 900 square feet is approved for a primary room in order to provide the space needed for the elementary school activity programs. It is interesting to note that the

E.P.S.B. policy is to reduce average class size from the 40-pupil to 35-pupil range while the Department is increasing classroom size from 750 to 800 square feet.

As far as the provision of sinks in elementary classrooms is concerned, there is no problem with the School Buildings Branch. They have approved the plans submitted inasmuch as the plans observe the cost limit of \$14 per gross square foot. In fact, on occasion, the School Buildings Board has approved the provision of separate toilet facilities built at the back of a classroom for the use solely of pupils in that room. Obviously, the cost per square foot for plans of that sort will be higher. It is, then, the local board's prerogative to decide upon the facilities to be within the classroom and elsewhere.

The second area of contention in Schedule A was the provision of science rooms, particularly at the secondary level. There has not been and is not yet any consideration for them in elementary schools, although modern theories of science education might question the wisdom of this policy. As far as secondary schools are concerned, the problem has two aspects: what kinds of science rooms are there to be, and how big need they be? Two kinds of science rooms are being approved, a science demonstration room and a science laboratory proper. Between 850 and 900 square feet is allowed for a science demonstration room and about 1200 square feet for a science laboratory. This latter figure has run as high as 1500 square feet. The new Harry Ainlay High School is to have

several of each kind of science room, thereby providing for a much better science laboratory education than was indicated by Schedule A.

Schedule A had allowed 800 to 1200 square feet for library space. The School Buildings Board has found it necessary to approve 1500 square feet for that purpose. As the recent trend toward larger central libraries grows, it would seem likely that 1500 square feet will prove inadequate for bigger schools. Perhaps the construction of general purpose rooms with provision for entry directly from the library bookshelf space will help in the resolution of that problem. Perhaps even larger allowances for library areas will have to be made, particularly if the library becomes the school reference center for books, maps, films, filmstrips, globes, and the other paraphernalia of modern teaching.

As it is now written into Schedule A, the School Buildings Board does allow in schools of eight or more home rooms a general purpose room of approximately 900 square feet.

With regard for gymnasium, stage and storage areas, there are again two aspects. One is the provision of space for elementary pupils as opposed to secondary students. The larger students need more space, and they play at organized games like volleyball and basketball which require more in the way of height, width and length than do elementary games and rhythm exercises. The second aspect, according to one official, is that stage facilities are not required nor made use of sufficiently by elementary students to warrant inclusion of them in elementary schools. Insofar as

floor area is concerned, elementary gymnasium and storage area has been reduced to approximately 2500 square feet while the facilities for secondary school students have been increased. In addition, allowance for two or more teaching stations is being made, thus permitting more flexibility in physical education programming.

The provision of showers and dressing rooms is approved only in secondary schools which by numbers of students warrant the cost of the facilities. In other words, no elementary schools in buildings separated from secondary school classes may have the provision and only secondary schools of five or more home rooms are likely to receive approval for them.

The School Buildings Board has found it necessary to increase the size of Industrial Arts areas. These were scheduled for 2000 square feet but the size of the apparatus required and the number of students in today's shops proved too great. At present, the plans are approved according to what can be justified by the program offered and by the number of students taking part. No change in Home Economics area seems to be imminent.

Another area for which the School Buildings Board has made extra allowance is the infirmary in city schools. The regular use made of them by city health nurses and by other health services has necessitated the increase.

The use of the discretionary powers vested in the School Buildings Board and the allowance of more adequate areas for some purposes has not resolved all the problems for the local board. The limit of \$14 per gross square foot does appear to pose some

problems even yet. If a school costs \$13.09 per square foot to build, as Glengarry Elementary (1962) did, and the architect's standard fee is \$0.75 per square foot of building, which it is now, the total is \$13.84. Therefore sixteen cents per square foot of building is allowed for furniture, equipment and landscaping. Should a building cost as much as \$13.25 per square foot there is no allowance for these three items, and some schools or additions, such as Laurier Heights Elementary-Junior High (1960) and Sherbrooke Junior High Addition (1962) cost as much as \$13.42 per square foot or more. Admittedly, most E.P.S.B. school buildings have cost \$11 or \$12 per square foot, but even for them there was the restriction to furniture, equipment and landscaping costs of \$1 per square foot of building. This \$1 limit is part of the previously mentioned \$14 limit. In some instances, the skills and wisdom of the architect, of the educational leaders, or of others might be questioned because the building costs were high. Delton Gymnasium Addition (1963) cost \$15.22 per square foot and Sherbrooke Junior High Addition (1962) was originally to cost \$14.50, although it was pared to \$13.50 per square foot at the insistence of the local board. In the same years, and in other years, additions or entire schools have been built for far less amounts per square foot.* Malmo Elementary (1963) cost \$11.11 per square foot and the four-room addition to Kensington Elementary (1963) cost \$11.85 per square foot. Although labor and supply costs rose rapidly in

*See Table IV, pp. 86 - 87, for the costs of building various schools. The architect's fee was quoted by the architect for the E.P.S.B.

1958 and 1959, the climb tapered off so that costs have remained fairly steady over the last few years. Thus the difference in final building costs must be traced to other causes.

An interesting development in the investigation, and concerning the \$14 building cost limit, was the result of trying to ascertain whether or not the \$40, \$55 and \$65 allowances per pupil as set out in the School Foundation Program Fund Regulations entirely paid for the approved building costs. They do not, but more will be said of that under the topic of finances. Whether or not the \$14 limit sets a psychological or actual "lid" on building plans will also be discussed at that time.

One of the things for which there is no allowance in The School Buildings Act, or the related items of control, is the provision of offices, garages or warehouses for a school district. In the past, before the School Foundation Program Fund and The School Buildings Act came into being, a school board could accumulate a Reserve Fund. The present E.P.S.B. offices were built from such funds. Under current regulations, any such buildings have to be financed by current revenues or by a supplementary requisition on local taxpayers. It appears that the proposed central office addition will have to be financed by these latter ways too.

The Regulations still have the controls of thirty-five per cent of the functional area for non-instructional purposes, or forty per cent in the case of larger schools. This control is viewed by the local board's architect as being tight but adequate.

It required economy and utility of space in order to stay within those limits, and the limits curtailed any grandiose schemes of architecture. One effect of the limits is to require the school planners to determine on a basis of priorities and value judgments the need for and sizes of things like hallway widths, the amount of space for showers, dressing rooms and toilet facilities, the provision of "mud-rooms", the amount of extra office space, the areas for storage, the size of staff rooms, and the provision of staff toilet facilities. Some of these, such as hallway widths, have to meet local fire and by-law specifications. The allowance of sixty square feet per equated pupil above the 290 pupil figure in Schedule A has, with the forty per cent limit for non-instructional purposes, proven quite adequate in Edmonton's large city schools. What would the situation be if the new regulations were to allow only twenty-eight square feet of functional area per equated pupil no matter how big the school became? (The twenty-eight square feet per pupil is about what Schedule A allowed for a ten room school.)

Generally speaking, there has been little difficulty in determining what might or might not be approved by the School Buildings Board. When a local authority has followed correct and established procedure after due preparation and planning for a new school or addition, and when the School Buildings Board has approved the Statements of Need and the sketch plans, the local board knows quite accurately what the areas and costs approved will be,

Telephone discussions and meetings between local and Board officials are used to resolve most problems before the sketch plans are ever submitted to the School Buildings Board. In this regard, there are perhaps some costs to the local authority, but they are the normal costs of term interpretation and definition experienced by any district in the completion of its business. If there is a problem at all, it is in estimating the actual costs of construction before the submission of tenders for construction. On occasion, the estimates are either above or below the actual tendered rates. The season of the year, the amount of construction being tendered, the availability of and prices for supplies, the availability of skilled labour, and the wages for labour are items which help to make the problem of estimating building costs more difficult. The problem is not the fault of the School Buildings Board nor of the local authority.

Occasionally the E.P.S.B. officials have found it necessary to revise the building plans because a city council has re-zoned a district within the city, or because an unanticipated number of children have moved into, or out of, a district within the city. Utility classrooms (the portables) of 880 square feet each, built at a cost of \$8.20 per square foot, are used to alleviate the temporary problems of pupil accommodation. When the problem is not temporary, an addition to existing facilities must be considered. In 1959 city council rezoned the southern portion of Gold Bar

district from single family to multiple family dwellings after the School Buildings Board had approved the sketch plans for the proposed school. The result was that the local board had to apply for an addition to the school, which was granted. However, to estimate the cost of the man-hours spent upon revision, the architect's problems in adding on, the extra costs involved in buying further land if any was needed, and similar items of consideration is nearly impossible. Prior to 1964 the School Buildings Board, which is really a Board organized under the Department of Public Works, met only once per month for one day at a time. It could take two months for the approval of either initial school building plans or the plans for a revision. Recently, the Board has been meeting for half a day once per week and approvals are taking a week or two at most when things are in order. What has been the cost of those previously long delays? No one can say.

The question was raised earlier as to whether or not the specifications and limitations imposed by the Department of Education resulted in any phase of the building plans being reduced or curtailed. Presumably, had the limitations and specifications of the Act, the Regulations and Schedule A been enforced as written, there may have been considerable difficulty. It is fortunate that provisions within the Act permitted the School Buildings Board and the Minister of Education to exercise a good deal of discretion, and it is fortunate that those discretionary powers appear to have

been used both wisely and usefully. As it is, the limitations imposed by the Department's agents have hampered little, if any, the fulfillment of urgent building plans or needs. Items such as gymnasium size, other physical education facilities, and office space have been reduced or eliminated in three or four instances. For example, McNally Composite High School is a school for which plans have been revised. The need for revision in some of these cases may have been due to faulty planning and inadequate local leadership as much as due to the legislation or regulations.

With regard to one-storey or multiple-storey buildings, the Regulations are not significant. The availability of site, the local fire regulations and building codes, the age of the students, and other factors are the items which really determine that which it is best to build. The local board tested the cost factor by building a one-storey school designed by the E.P.S.B. architect and a two-storey school designed by an outside firm of architects. The single-storey, twelve-room school called Lendrum Elementary cost \$11.46 per square foot while Glengarry Elementary, a two-storey fourteen-room school, cost \$13.09. Both schools were built in 1962. The extra cost for the two-storey facilities is partly accounted for by the need to reinforce the whole of the base, the need to build a solid deck above the ground floor rooms, and the need for stronger walls in order to support the upper floor. In addition, a good argument in support of one-storey buildings is the

ease of entry to or exit from the building, whether for fire drill purposes or for equipment supply and cleaning.

However wisely the discretionary powers have been exercised, and whatever the revised editions of the Regulations may contain, there are still problems to be solved, and likely there are other problems developing for solution. Edmonton has lately grown at a tremendous rate. In 1929 there were 14,687 students enrolled in the city's public schools. After 17 years, in 1946, there were 15,223 pupils, which is not much change. On December 31, 1963, there were 49,767 pupils enrolled, an increase of roughly thirty-five thousand pupils in seventeen years. Prior to January 1, 1946, the E.P.S.B. owned thirty-three schools which were worth at that time approximately \$1,850,000. Since January 1, 1946, up to and including December 31, 1963, the E.P.S.B. has acquired ninety-one more schools or major additions and all these were valued at \$55,000,000. Another million dollars' worth of buildings was added when Beverly was annexed to Edmonton in 1961.⁷⁰ There is every likelihood that the number of children will continue to increase. At the same time as the number of students increases, new techniques of teaching are demanding differences in school design. As Jonathan King, of Educational Facilities Laboratories, New York, has said:

⁷⁰Enrolment figures and school building figures quoted are from the E.P.S.B. Annual Financial Report for the Year 1963, p. 21 and pp. 15 - 17 respectively.

We must build our schools to accommodate changing patterns...Most schools are not ripped down until they become unsafe. The schools we are building today won't become unsafe, and unless they are built in such a way that they can be altered easily to accommodate changing educational needs, we are going to rue the day we built them.⁷¹

II. THE SCHOOL BUILDING HANDBOOK: 1959

Like the School Buildings Act and the Regulations, the Handbook is in the process of revision. It is still used frequently by the E.P.S.B. architect as a ready reference for building ratios and regulations, but in many ways it does not contain the latest guides for modern building, nor does it clearly state the basis for decisions by the School Buildings Board. A new book incorporating Department policy is needed.

III. FINANCES

The claim that the Department of Education pays for one hundred per cent of the school building construction costs is highly debatable. It is true that the Government guarantees the payment of one hundred per cent of the debenture charges for eligible debts due and payable in any one year. To be eligible debts, they must be debts incurred for the building approved by the Department of Education. It is also true that the Province collected from Edmonton public school taxpayers, by the thirty-two mill equalization

⁷¹"Conference on School Design", a report in the Canadian School Journal, Vol. 41, No. 7, October, 1963, p. 28.

tax, a total of \$10,444,705 in 1963,⁷² and the city raised a supplementary levy of \$3,091,885 for the same year.⁷³ Also, in 1963, the E.P.S.B. received \$16,759,577 from the Department of Education under the terms of the School Foundation Program Fund and sundry other Government grants.⁷⁴ In other words, the Provincial Government paid out \$6,314,872 more than was collected by the thirty-two mill levy.⁷⁵ Furthermore, although the Government might be credited with paying for one hundred per cent of the debenture obligations for eligible debts, from whom was the \$10,444,705 really collected? It might be argued that the Government contribution from sources other than the property of public school supporters was the difference between \$16,759,577 and \$10,444,705, or the sum of \$6,314,872. In any case, total expenditures for the E.P.S.B. were \$20,266,441 or \$11,856 more than the total revenue. Of this twenty million dollars, \$2,574,386 was used for debenture interest and debenture redemption.⁷⁶ This figure was \$183,878 more than would have been produced by utilizing the School Foundation Program Fund rates of \$40 per elementary

⁷²Edmonton Public School Board, Current Budget for the Year 1964, January 24, 1964, p. 108.

⁷³Edmonton Public School Board, Annual Financial Report for the Year 1963, p. 7.

⁷⁴E.P.S.B. Current Budget, op. cit., p. 108.

⁷⁵Ibid.

⁷⁶Ibid.

pupil, \$55 per junior high pupil, and \$65 per senior high pupil.⁷⁷⁷³

Because of this and similar situations in other districts, the School Foundation Program Fund Regulations are being revised.

According to the Current Budget of the E.P.S.B. for the year 1964:

The actual percentage of the 1963 expenditures financed by the Government Grants from the general revenues of the Province was 31.92% while it is estimated that for 1964 the percentage will be 31.43%--a decrease of .49%.⁷⁸

The same Budget reports that the Government's share was 32.33 per cent in 1962,⁷⁹ which meant a decrease of 0.41 per cent in 1963.

Table II, page 74, shows a comparison of Government grants and property taxes for the E.P.S.B. The evidence in Table II seems to indicate that the Province's share of the total revenues raised by property taxes and Government grants above the thirty-two mill levy has remained fairly steady. Except for the year 1961, when the Government made a contingency grant of \$300,000, the local taxpayer has had to support about sixty-eight per cent of the total school costs. While the table shows that the amounts

⁷⁷On December 31, 1963, there were: 28,826 elementary pupils; 11,773 junior high pupils; and 9,168 senior high pupils. E.P.S.B. Annual Financial Report, 1963, p. 21.

According to p. 108 of the Current Budget, the calculated School Foundation Program Funds, under Part F of the Regulations, would have been \$2,390,508.

⁷⁸E.P.S.B. Current Budget, op. cit., p. 11

⁷⁹Ibid., p. 5.

TABLE II
A COMPARISON OF GOVERNMENT GRANTS AND PROPERTY TAXES
FOR THE EDMONTON PUBLIC SCHOOL BOARD⁸⁰

Year	Property Taxes	Government Grants	Govt. Grants plus Property Taxes	Govt. Grant As a Per Cent of the Total
1957	\$ 6,638,692	\$2,849,764	\$ 9,488,456	30.03%
1958	8,155,700	3,719,780	11,875,480	31.32
1959	9,228,372	4,334,725	13,563,097	31.96
1960	10,328,553	4,932,689	15,261,242	32.32
1961	11,193,621	6,005,727	17,199,348	34.91
1962	12,394,075	6,044,515	18,438,590	32.78
1963	13,536,590	6,461,629	19,998,219	32.31

⁸⁰Basic information from the E.P.S.B. Current Budget, op. cit., p. 6.

raised by property taxes has steadily increased since 1957, it also shows that the amounts paid in Government grants have increased proportionately.

As long as the Government continues to pay the cost of debenture payments in the present manner, and no ineligible debenture debts are due, there is little evidence to indicate the Province's actual share in paying for school building construction costs. It is a matter for inference, because the school building construction costs are buried in the systems for accounting and for grant distribution, and because the Government's share of total costs has apparently remained the same.

Because the Government has applied School Foundation Program Funds to pay for one hundred per cent of the debenture costs for eligible debts, and because those debts for debenture interest and redemption in a given year have been over the calculated amounts at the \$40, \$55 and \$65 rates, the School Foundation Program Fund Regulations can not justifiably be used as an excuse for curtailing or reducing the necessary building program. Ignorance of the manner in which the School Foundation Program Fund Regulations are applied to school building construction costs might result in a sort of psychological "lid" being imposed. The real controlling factors are the \$14 per gross square foot limit on building costs imposed by the School Buildings Act, and the approval or rejection by the School Buildings Board of items in the proposed construction.

Under the present regulations, one of the ways by which to reduce the problems of financing schools for a given year would seem to be as follows. When a school is built, equip it fully with blackboards, tack boards, pencil sharpeners, cupboards, shelving, and all the other permanent or fixed equipment which the school will need. Obviously the cost initially will be greater than if some or all of those items were left out, but, if the School Buildings Board approves the plans and the completed project, these items, like the rest of the school, are financed by debentures of eligible debts. Since the Provincial Government School Foundation Program Funds are granted to pay the debenture costs of eligible debts, the items then are being paid for by the debenture route and not from the current operating account. The \$14 limit to the building costs is the controlling factor. By either route, the costs for the items are likely to be about the same but the financing of current accounts may be eased.

The above is an illustration of the manner in which definitions or terms may have different meanings. If the items mentioned (blackboards, tack boards, pencil sharpeners, et cetera) were included in the original building, they would be regarded for financing as part of the capital costs. However, once the building is formally completed, the installation of these same items must be financed as part of the operating costs. In other words, in the first situation they are recognized as capital building costs, but in the second situation they are regarded as operating costs.

This makes a difference financially for the financial support from the Provincial Government for operating costs is based essentially upon the number of teachers and number of students, not upon the specific items required.

Another illustration of difficulty with terms is in the matter of site development. Normally, building costs would be thought to include the costs for site, but, as indicated previously, furniture, equipment and landscaping costs are supported by the difference between the \$14 limit and the sum of the actual building cost per gross square foot and the architect's fees. There is no allowance for the purchase of land. Reducing the actual building costs may help a bit, but the School Buildings Act Regulations does set a limit of \$1 per square foot of building for the purpose of furniture, equipment and landscaping costs, the \$1 limit being part of the \$14 per gross square foot limit.

The problem of definition, or terms, is not unique to the Edmonton Public School System. This is a problem faced by every district in the interpretation of the rules of government. It is not likely to be resolved easily, for different terms and accounting procedures, each valid in its own way, may be utilized by a number of districts. If better provisions for site development costs are required, they are not likely to be forthcoming by a choice of different words without a change in the limits.

The question was previously raised as to whether or not budget estimating and budget control were made more difficult by

the rules and regulations of the Department of Education concerning school building construction. Except for one or two areas, the answer is no.

The most noticeable area of difficulty is in the matter of estimating building costs for purposes of the Statements of Need, which have to be submitted to the School Buildings Branch with the sketch plans for proposed construction. It is after receiving approval of building plans by the School Buildings Board that tenders for construction are requested and submitted. If the tenders are out of line with the anticipated costs there is some difficulty both with the School Buildings Board and with the finances, for the normal procedures will have developed to, or beyond, the by-law stage at that time. Thus, the Local Authorities Board may be involved too. This is a problem which would probably still exist were there no School Buildings Board, and a situation for which the Province has little enthusiasm.

The second area of concern is the matter of costs due to revisions of plans. Some revisions are necessitated by the actions of city council. Re-zoning a city district after the plans for the construction of a school building have begun, no matter at what stage of development they may be, involves a cost of revision for which there is not likely to have been a budget estimate. When the plans have been approved by the School Buildings Board, or when the actual construction is under way, the costs will be higher

and more of a strain upon the operating budget for the year. The other ways that cause a revision of plans, the revisions necessitated by poor educational leadership, by poor planning, by the poor execution of trustee duties, or by poorly devised Regulations, can cost money, too, for which there will be no budget allowance. As indicated this cost is not necessarily due to the Regulations. When it involves an addition to or major alteration of a completed building, and when the School Buildings Board approves plans for revision, the actual costs of the approved construction can be financed by the debenture route, but the costs for the man-hours of planning the revision are an added local drain which would not have been incurred had the original facilities proven adequate.

One of the claims used to introduce the School Foundation Program Fund Regulations was that the new legislation would keep the costs of education from rising. Table III contains an excerpt from the E.P.S.B. Current Budget for the year 1964⁸¹, which shows that expenditures have risen from \$11,909,177 in 1958 to an estimated \$21,812,842 for 1964. There seems to have been a steady rate of climb. During the same time, the financial charges for debenture interest, debenture redemption, and interest and exchange have ranged from \$2,233,428 in 1958 to a high of \$2,778,599 in 1961. For 1963 the charges amounted to \$2,605,866. Because debentures can be, and are, issued for redemption at different future dates, and because most of the building costs are deferred in this way,

⁸¹E.P.S.B. Current Budget, op. cit., p. 13.

TABLE III
EXPENDITURES 1958 - 1964
(from the E.P.S.B. Current Budget for the Year 1964)

	1958	1959	1960	1961	1962	1963*	1964 Budget
Financial charges	\$2,233,428	\$2,448,786	\$2,654,682	\$2,778,599	\$2,567,646	\$2,605,866	\$2,787,742
Administration	717,847	722,222	806,170	802,997	922,369	1,016,359	988,000
Instructional	7,197,275	8,393,251	9,749,962	11,536,634	12,754,062	14,075,634	15,320,600
Maintenance and operation of plant	1,760,627	2,209,370	2,307,893	2,383,767	2,453,679	2,542,241	2,716,500
	11,909,177	13,773,629	15,518,707	17,501,997	18,697,756	20,240,100	21,812,842

*estimated

it seems impossible to determine if the Department Regulations have helped control the building costs or not.

As for the average costs per pupil for all purposes in Edmonton, the records show a steady increase from \$318.04 in 1958 to \$405.22 in 1963. The climb is an extension of the rise in costs from 1946 when the average cost per pupil was only \$109.75.⁸² The conclusion is that the claim of the Minister of Education that spiralling school costs would be controlled was not fulfilled.⁸³ The number of students increases, the need for further building continues, a larger staff must be employed, and the costs of supply and labour may continue to rise.

SUMMARY

Much of the concern about the legislation, regulations and directives has been wasted unless the earlier concerns of others provided the incentive to use judiciously the discretionary powers possessed by the School Buildings Board, the Minister of Education, or other agents in the Department of Education. The limitations of the legislation as they were implemented have not proven unduly restrictive. Necessary facilities and equipment have not been eliminated or restricted except by the ordinary controls of economy and priority exercised almost entirely by local agencies. Class

⁸²E.P.S.B. Annual Financial Report, op. cit., p. 20.

⁸³See page 29 of this thesis.

size is not increasing; in fact, by policy, it is being reduced. The regulations and legislation as applied, without the need to give the city school system special concessions, enabled the local board to build satisfactory and pleasant schools. The legislation was not significant as an aid or a hindrance to the planners of schools, including the architect. Much more significant were the local fire laws and building codes. Under the legislation, the Department of Education does not pay one hundred per cent of the building costs, nor has the evidence shown that total costs for all purposes have been prevented from rising. Budget estimating and budget control problems should not be blamed entirely, nor even extensively, upon the legislation and regulations of the Provincial Government as they were executed.

Some question might be raised about the adequacy of the \$14 per gross square foot limit as it is applied, particularly in view of increasing landscaping costs, the need to purchase land in convenient locations. A question arises as to what will happen if ever debenture interest and redemption charges for ineligible debts come due. Further questions are apt to rise when the anticipated legislation and regulations are made known and effective.

In the light of these discoveries and questions, what appear to be the answers to the problems with which this thesis was begun? The next chapter attempts to provide answers to those.

CHAPTER V
AN EVALUATION OF THE LEGISLATION
AND SOME RESULTS FOR THE E.P.S.B.

The problem was to determine certain implications for the Edmonton Public Schools of the provincial provisions for the financing and construction of school buildings as specified in the School Foundation Program Fund, The School Buildings Act, and the respective Regulations. The sub-problems were grouped into two categories: (1) What, if any, were the problems in complying with the terms and regulations of the Acts? and (2) How are the Acts and Regulations evaluated with respect to some principles of educational finance?

I. THE PROBLEMS PRESENTED

The first sub-problem. Were the building requirements restrictive to the local officials who plan the schools?

The details concerning the financing and construction of school buildings were not implemented entirely as they were written in Schedule A, in other regulations, and in the Alberta School Building Handbook. Use was made of the discretionary powers vested in both the Minister of Education and the School Buildings Board. Provision was made in McNally High School plans, and in other schools, for such things as team-teaching stations, at least

two types of science rooms, and several stations for physical education classes. Larger areas than those listed in Schedule A were permitted for Industrial Arts. Gymnasium sizes for secondary schools were increased whereas the areas for physical education in elementary schools were reduced. Library areas permitted were bigger too. Ordinary classrooms have been built as large as 850 square feet, as opposed to the 750 square feet allowed by Schedule A. The frequent use made of the infirmaries in city schools was recognized by larger space allotments.

Each of these approvals for larger areas has had an impact financially for had the extra areas not been approved the costs for them would have been ineligible debts for which supplementary requisitions upon the taxpayer, or other means of financing, might have been required. An alternative to the use of supplementary levies or financing from current accounts might have been the elimination of that which appeared to be essential facilities. As it happened, most of the problems created by the legislation were minor and curtailments or restrictions were mainly those due to the principles of economy and priority as exercised by local authority.

One control which appeared to restrict those who locally planned the schools was the limit of \$14 per gross square foot for building costs, and this limit appeared to be adequate if there had been bigger or better allowances for furniture, equipment

and land needs. Up to one dollar of the fourteen dollars per gross square foot limit was permitted for furniture, equipment and landscaping. Architect's fees, added to the building cost per gross square foot, were normally seventy-five cents per square foot, and building costs, as indicated by Table IV, were frequently above \$12.25 per gross square foot. The more the cost of building exceeded \$12.25 per square foot, the less there would be available from the one dollar maximum allowance for the furniture, equipment and landscaping. As the local architect said, this \$14 limit was tight but adequate, necessitated the selection or rejection of proposed items on a basis of priorities and needs, and prevented the development of grandiose schemes.

One problem appeared to be the lack of a scaled allowance for land purchase and preparation. A school district must build the school relatively near the center of the population for which the accommodation is required, otherwise transportation to the school becomes a problem. The city school district must sometimes purchase and use the land which is available, regardless of the original condition of the terrain. Ravines, hills, marshes, undulating contours, brush or other features may increase the cost of site preparation. Special and more costly provisions in the design and construction of the building may be required too. For example, a school built upon a plot of ground on which there has been considerable fill dirt added and on which there was previously a marsh or slough may require special pilings and reinforced foundations

TABLE IV
THE AREA AND COST PER GROSS SQUARE FOOT
OF SCHOOL BUILDINGS COMPLETED,
1958 - 1963 INCLUSIVE*
(architect's fees excluded)

Year	Name of School	No. of Rooms	No. of Gross Sq.Ft.	Cost Per Gross Sq. Ft.
1958	McArthur El.	14	29,120	\$11.99
	King Edward J.H.	12	40,817	12.17
	Killarney J.H.	16	45,416	14.50
	Queen Eliz. Comp.	24	126,898	14.75
	Kensington El.	14	29,120	11.96
	Gold Bar El.	14	29,120	12.18
	Ross Sheppard Add.	16	28,925	12.58
	Crestwood El. Add.	10	16,255	11.14
	Ottewell J.H.	24	57,800	13.25
	Mill Creek Add.	8	15,021	11.40
1959	McQueen El. Add.	2	2,080	12.49
	Terrace Hts. El.	10	24,391	12.92
	Laurier Hts. Add.	4	4,500	10.40
	Bonnie Doon Comp. Add.	12	24,889	11.86
	Belvedere El.	16	29,883	12.11
	Braemar El.	16	29,883	11.80
	Rosslyn J. H.	17	39,974	11.90
	Dovercourt Add.	8	9,172	11.10
	Mount Pleasant Add.	10	16,774	11.75
1960	Balwin J.H.	17	39,974	11.76
	Argyll El. Add	2	2,080	12.31
	Hardisty Shop & H.Ec.	-	4,332	14.00
	Grandview El.-J.H.	10	23,066	13.32
	Fulton Place El.-J.H.	24	29,360	13.07
	Mee-Yah-Noh El.	17	29,360	12.55
	Scott Robertson El.	Lib. + 16	29,360	12.51
	Laurier Hts. J.H.	Lib. + 13	24,300	13.42

*Information supplied by the E.P.S.B.

TABLE IV (continued)

Year	Name of School	No. of Rooms	No. of Gross Sq.Ft.	Cost Per Gross Sq. Ft.
1961	Gold Bar Add.	6	6,770	\$10.14
	Eastglen Comp. Gym	-	6,384	11.81
	Queen Eliz. Comp. Add.	14	23,642	12.64
	Wellington J.H. Add.	12	18,785	11.13
	Avonmore El. Add.	Lib., Gym. + 13	24,300	12.80
	McCauley Add. (Gym)	-	8,496	13.57
1962	Kenilworth J. H.	24	51,800	12.04
	Glengarry El.	14	38,000	13.09
	Lendrum El.	12	26,941	11.46
	Capilano El. Add.	Lib. + 4	7,727	11.98
	McArthur El. Add.	Lib. + 4	7,727	11.70
	Sherbrooke J.H. Add.	12	32,916	13.50
	Victoria Vocational H.S.	64	214,168	13.76
	Ross Sheppard Com.-Voc.	Cafeteria + 16	51,309	14.57
		+ Sc. Project Rm.		
1963	Athlone El. Add.	5	5,349	12.39
	Delton Gym Add.	-	5,672	15.22
	Fulton Place Add.	8	12,013	11.22
	Kensington El. Add.	4	7,524	11.85
	Lauderdale El. Add.	Gym. + 6	11,526	13.20
	Malmo El.	Lib., Gym. + 12	28,278	11.11
	McNally Comp. H.S.	28+	82,250	13.14
	Princeton El.	Lib., Gym. + 10	21,887	12.42

20 Utility Classrooms of 880 square feet each built in 1959 cost \$8.20 per gross square foot.

or floors in order to reduce the sinking, settling or cracking of the building. McKernan Elementary-Junior High and Lendrum Elementary schools were built on ground like that. Furthermore, unless the land had been previously set aside for schools by provincial act or city by-law, the purchase price of the required land might be many dollars per acre compared to only a few dollars when the city was much younger. The acre once priced at sixteen dollars may now cost two hundred dollars, or even six thousand dollars, depending on surrounding developments. The money to meet these costs now comes from current operating accounts or from reserve funds accumulated before the School Foundation Program Fund began. If the money comes from current operating accounts, those costs may reduce the amounts available to meet instructional requirements. The Budget for 1964 included \$85,000 to pay for land for school sites in the southwest section of the city.⁸⁴

Another problem appeared to be the lack of provincial government support for the building or purchase of offices, garages and warehouses. Garages may not be so important to city systems as to rural divisions and counties, but a city system does require larger central office and warehouse facilities when there are the large numbers of pupils and schools such as Edmonton had in December, 1963. There were 49,767 pupils in over ninety schools.⁸⁵

⁸⁴E.P.S.B. Current Budget, op. cit., p. 3.

⁸⁵E.P.S.B. Financial Report, 1963, op. cit., p. 21.

The administration offices were thought to be too small so budget estimates of \$345,707 for an office addition were made in 1964.⁸⁶ The money for these costs was to come from Capital Reserve Funds which had been accumulated before the introduction of the School Foundation Program Fund. Such Reserves cannot be established under the present scheme. Under Part F of the School Foundation Program Fund Regulations there can be no provincial government payments for the purposes of acquiring local offices, garages, warehouses or residences.⁸⁷

The conclusion is that the legislation was restrictive in some regards because it made no provision for certain necessities such as central office space or warehouse facilities. Whether or not the legislation was unduly restrictive to the designing and construction of the actual schools cannot be determined. Certain things like planned office space or gymnasium areas have been reduced, but these restrictions may have been desirable from the standpoints of priority, economy or usefulness. The problems which appeared likely when the Regulations were read have frequently been resolved by means of telephone discussions or meetings between officials of the local board and those with the Department of Education.

⁸⁶E. P. S.B. Current Budget, op. cit., p. 3.

⁸⁷See page 40 of this thesis.

The second sub-problem. Could the requirements be adhered to without requisitions for further revenue?

In 1963 the E.P.S.B. requisitioned \$3,091,885 whereas the 1964 Budget called for a requisition of \$3,781,088 from the City.⁸⁸ Some of that money may have been used to pay for the unapproved costs of buildings when the local board went beyond that which was approved by the School Buildings Board. The Financial Report for 1963 contains a note that reads:

At December 31, 1963, costs on completed capital projects exceeded debenture funds and grants received by \$507,654. This over-expenditure has been financed from proceeds of the sale of capital assets in the amount of \$272,734 and the balance from unused funds provided for current projects.⁸⁹

The conclusion is that some of the requisitioned money may have been used for building purposes although the records do not specifically state it. That the School Foundation Program does not eliminate the use of supplementary requisitions is clear.

The third sub-problem. Was the combined effect of the Regulations causing an extra burden of costs for education in the Edmonton Public School System?

There appears to be nothing recorded specifically about the extent to which supplementary requisitions had to pay for unapproved costs or for other costs due to the Regulations. There

⁸⁸E.P.S.B. Financial Report, 1963, op. cit., p. 3 and the E.P.S.B. Current Budget, 1964, op. cit., p. 110.

⁸⁹E.P.S.B. Financial Report, op. cit., p. 6.

must be an added expense for somebody because both local officials and Department of Education officials check the same school building plans. There must have been added costs for revisions of plans made at the request or direction of the School Buildings Board. The plans for McNally High School were revised several times, at least once upon request from the Department. These costs and perhaps other extra costs are distributed between the particular project and local department operating costs. Nobody could calculate them, but they are charges which must form part of the expenses which make a supplementary requisition necessary. Although no one can calculate specifically the costs incurred by the legislation, there seems to have been an extra burden of costs for education in the Edmonton Public School System

The fourth sub-problem. Did the plan prevent school-building-program costs from rising?

Whether or not the school-building-program costs have been prevented from rising is difficult to determine. The average number of students per year has increased from 41,731 in 1960 to 49,767 in 1963,⁹⁰ and the average cost per pupil for all purposes has progressed from \$369.55 to \$405.22 during the same time.⁹¹ Because building costs are usually buried in debenture costs, and because debentures sold, even in one year, may mature at different

⁹⁰E.P.S.B. Financial Report, op. cit., p. 21.

⁹¹Ibid., p. 20.

future dates and with different rates of interest, there seems to be no way to show conclusively whether or not the costs of building are changed or changing. It may be significant that the rate for 20-year debentures has been 3.35 per cent in 1948, 3.5 per cent in 1957, and 5.75 per cent in 1963.⁹² The rate has climbed.

Table V is developed from information in the Annual Financial Reports for the years 1957 to 1963 inclusive. There seems to be no evidence in the Table to indicate a greater total debenture indebtedness than there was in 1960, although the total debt has increased in 1962 and again in 1963 from that for 1961.

Table IV, pages 86 and 87, shows the building costs per gross square foot of building, exclusive of architect's fees and charges for land purchase, development and landscaping. Fluctuations in price could be attributed to many things, including: the skills and knowledge of the architect involved; the educational leadership; the season of the year; the availability of skilled labour; item cost variations; wage differences; the grade level for which the school was built; soil conditions at the site; the amount of construction being tendered at the time; and the decisions of the local board at the time the tenders were selected. Even the School Buildings Board may have had an effect on the variations in cost per gross square foot, but the evidence is not there.

⁹²Ibid., p. 14.

TABLE V

THE TOTALS FOR PAYMENT OF PRINCIPAL AND INTEREST
TO MATURITY ON OUTSTANDING DEBENTURE DEBTS
(as of December 31 of each year)⁹³

Year	Amount	Year	Amount
1957	\$31,708,555	1960	\$36,742,657
1958	33,557,613	1961	34,086,705
1959	35,943,296	1962	34,287,484
		1963	35,401,724*

*estimated

⁹³The figure for 1963 is from the E.P.S.B. Financial Report, op. cit., p. 13. Each of the other figures is from the Financial Report for the respective year.

Because there are more pupils than there used to be and more buildings needed to house them, because the average cost per pupil for all purposes has increased, and because the rate of interest for debentures has increased there is an inference that the cost of school-building-construction has increased. The architect for the E.P.S.B. claimed that more fixed and permanent equipment than previously is being installed in Edmonton Public Schools. Perhaps economies have helped to keep down the cost per gross square foot. Perhaps the systems used in accounting and in financing hide any increase in cost there may have been.

The fifth sub-problem. How did the Acts and Regulations affect local autonomy in the matter of school building construction?

The School Buildings Act requires a local board to submit any plans for the construction of school buildings, or plans for an addition to or major alteration of a school building, to the School Buildings Board for their inspection and approval. The School Buildings Act and the School Foundation Program Fund Regulations both contain clauses saying that the local board may go beyond the limits approved by the School Buildings Board, but that those extensions beyond the approval shall not be a charge under Part F of The School Foundation Program Fund Regulations. The key point is that the School Buildings Board, a Board under the Department of Public Works, makes a decision as to what the school facilities will be. Because the Board grants a limited approval and because

there is a limit to the property taxes which local citizens will willingly pay, or which they might be able to pay, the building costs per gross square foot have approximated the limit of \$14 set by the Government and the schools have been built almost exactly according to the approved design of the School Buildings Board.

That the School Buildings Board was organized under the Department of Public Works was only one aspect of the difficulty. In 1963, of a Board of three persons, only one was an educator who might have had direct experience with the educational necessities and limitations of school buildings, yet this Board was the ultimate authority for the approval or rejection of proposed construction plans. The Board needed a bigger representation of educational leaders, for it is the educational policy which should determine the school facilities, not the building which should determine educational policy.

In addition to the problem of the School Buildings Board, there is the Local Authorities Board. If a local board makes a supplementary requisition upon the City for more money, and if City Council objects to the amount requested, the need for the money and the decision as to the amount of requisition to be permitted is referred to the Local Authorities Board,⁹⁴ a Board under the Department of Municipal Affairs. In effect, the L.A.B. can determine how much will be spent for educational services.

⁹⁴The School Act, Chapter 297 of the Revised Statutes of Alberta, with amendments up to and including 1963, Section 304, p. 103.

The conclusion is that local autonomy is reduced because two Boards, neither of them part of the local school organization, can determine the kinds of school buildings and the amount of money which will be available for educational services.

II. EVALUATION BY PRINCIPLES

The second category of questions involved evaluation of the legislation according to some principles of educational finance.

The first question. Does the scheme conform to the principle of adaptability?

Adaptability is defined as the ability to adjust to newly developing needs, or to insights into methods of meeting older needs. The fact that schools are being altered or constructed in order to meet new requirements or in an effort to resolve old problems would indicate that the scheme has been quite adaptable. McKay Avenue Junior High School is being used to provide special programs for pre-employment or pre-vocational classes. W. P. Wagner High School is to have a variety of programs, including some pre-vocational and modified classes. Hillcrest Junior High School, built under the direction of the Jasper Place School Board, was radical in design. The school was circular and there were no windows in the classrooms. Furthermore, there has been more provided in McNally High School, and in other schools, for physical education stations or for science education facilities than was indicated by Schedule A of The School Buildings Act.

The conclusion is that the ability of the School Buildings Board, or of the Minister of Education, to make decisions for which the Regulations proved inadequate enabled adjustments to be made in order to meet newly developing needs and to establish facilities and programs which might better meet the requirements of old problems.

The second question. Does the scheme conform to the principle of flexibility?

Flexibility is defined as the ability to achieve the recognized end with due regard to the differences in situations and individuals concerned.

If the end considered is the completion of an adequate number of school buildings in which to house the pupils, then the scheme has worked fairly well. Most of the new districts within the city have had the necessary schools relatively soon, but there have been cases of overcrowding or delay. Ottewell Junior High had students in attendance who came from neighbouring areas because additions to older schools or new school constructions were not complete. Strathcona Composite High School is overcrowded, particularly in grade X, because there is not yet another high school in the south west corner of the city. These delays might be credited to the scheme, but they might also be the fault of local personnel or the city council. The action of the city council in re-zoning Gold Bar district from a one-family to a multiple-family dwelling

district is a case in point for the original facilities were taxed beyond their limits. An addition became a necessity.⁹⁵

If the differences in administrative organization and the differences in training, experience and numbers of personnel is considered, then the scheme may be examined critically. Many districts, divisions or counties in Alberta do not have the personnel that the E.P.S.B. must have in order to operate effectively. In some cases only a Superintendent and a Secretary-Treasurer, with the assistance of the school principals concerned, manage the system. Those systems may need the leadership and control of the Department of Education or others. The E.P.S.B. has separate departments of administration, finance, instruction, pupil personnel services, planning, architecture, and maintenance, and there are divisions within the departments. Districts, divisions or counties with smaller numbers of pupils and fewer schools might find it impractical and economically impossible to maintain those separate departments or to hire continuously the number of qualified persons necessary to plan the schools and to operate the systems, yet the large city system needs those departments and the personnel if the system is to operate efficiently and if the system is going to meet the needs before they become acute problems. Table III, page 80, indicated that over twenty million dollars would be spent by the E.P.S.B. in 1964. With such large sums of money involved

⁹⁵ See pages 67 and 68 of this thesis.

and with the needs of fifty thousand pupils to be provided for, each department as well as the administration has to develop controls and checks in order to keep facilities and services in balance. The decisions of local personnel are based upon the revenues, the budget, the resources, the priorities and value judgments. Advice, when needed, is solicited from other sources such as private companies, other school systems, and the Department of Education. The question is raised, then, as to whether the control of the E.P.S.B. or other large systems by outside agencies like the Local Authorities Board and the School Buildings Board is necessary or even desirable. Trustees, with the advice of the local personnel, could make the policy decisions, and the qualified personnel could supervise the system. If errors were made, local personnel could be held accountable. As it is now, it is difficult for the layman, and even for the educator, to determine the source of problems, to ascertain how the system works, and to isolate responsibility for actions taken or not taken.

The conclusion is that the scheme fails to recognize the differences in the administrative organization of the city system as compared to the smaller units of school administration. The differences are those of necessity, economic possibility and practice. The district, division or county with only a fraction of the number of schools or with relatively small enrolments cannot afford the larger central office staff that is necessary for the efficient operation of the Edmonton Public Schools. Even if the unit could

afford the staff, there would not likely be enough demand for the talents, experience and knowledge of the personnel to justify a continuous expenditure for their services.

The third question. Does the scheme satisfy the principles of economy and efficiency?

The evidence that costs per pupil for all purposes had increased was presented earlier under the topic of school-building-program costs. The legislation does not apparently stop those costs from rising. In addition, under the section dealing with extra costs for the E.P.S.B., the point was made that although no one could calculate specific amounts there did seem to be costs due directly to the legislation. Because the school district's architects and the Department of Education both checked carefully the plans for school construction there were extra costs of duplicated services. There were the costs of long delay in receiving approval from the School Buildings Board, delays which lasted a month or more according to the Director of School Administration, the Department of Education. Sometimes costs for the E.P.S.B. were increased because the Department required revisions to school plans, as in the case of McNally High School. There were probably other costs which were impossible to calculate because they were the costs in time and effort for negotiation, or in getting an interpretation from Government officials. If these costs can be legitimately charged to the legislation, they absorbed

money that might better have been used for instructional purposes, for essential facilities, or for other services.

One way in which the Provincial Government increased efficiency and economy was in the assistance with debenture sales. The Government helps to sell them on the market, guarantees the interest on the debentures, or buys the bonds itself. As a result, the debenture sales are easier to make than if they had to be sold on the open market without government guarantees.

The Government appears to have increased the costs of education locally by duplicating some of the work with the school building plans, by requiring the revision of some school plans, by causing some delays in the implementation of building plans, and by causing extra time and effort to be taken by E.P.S.B. officials in order to ascertain that which the School Buildings Board would approve. That the Government has saved time or money is likely also, for some revisions to the plans probably did save money, there may have been greater care taken by the E.P.S.B. officials to economize, and the E.P.S.B. found that the sale of debentures was facilitated by the Government. The question might be raised as to whether the loss or gain for the E.P.S.B. was greater.

Further questions. Does the scheme meet the requirements of the principle of local responsibility? Is the responsibility for educational services and the authority to finance those services vested in the same agency?

The British North America Act of 1867 made the provinces responsible for educational services. These responsibilities have been, by tradition and by provincial direction, largely delegated to local bodies, such as local school boards. The School Act lists the specific duties of the local board in Alberta.⁹⁶ The legislative authority remains with the provincial governments to do as they like.

Even though the Provincial Government has the right to alter the manner in which educational services are provided, any action by the Government which changes the prerogatives or finances of local boards should be questioned. For many years local citizens have helped to determine the services which were provided in their schools. Each piece of legislation which created a control by the Provincial Government removed responsibility further from the local district.

The School Buildings Board was established by the Government in an effort to control the design and construction of school buildings, and thereby to control some of the costs of education. The Local Authorities Board was assigned the task of determining the limit to which the local citizen would be taxed by local boards. When a school district wished to build or alter a school, the School Buildings Board inspected all the detailed plans and determined the extent to which the Province would support the program,

⁹⁶The School Act, op. cit., Sections 173 to 230 inclusive.

as well as the appropriateness of the plans. If a local board felt a need for more money than the School Foundation Program Fund would provide as determined by the plans approved by the School Buildings Board, or otherwise, then the local board was to request a supplementary requisition upon the local taxpayer through the Municipal Council or City Council. If the Council felt that the supplementary requisition was excessive, then the requisition could be referred to the Local Authorities Board for its decision.⁹⁷ This latter Board had no specific responsibility to provide the educational services yet it had the final say as to the amount of money which could be raised.

Besides the difficulty in raising necessary funds from which to provide the educational services, the need for a supplementary levy must sometimes create anxiety until the municipal authorities agree to tax the citizens further. The local board has no authority to tax directly yet it is expected to provide an adequate education for the children in the area.

Local responsibility to provide educational services has always been limited by Provincial Government legislation. The degree of limitation is the point of contention. The creation of the School Buildings Board with its powers to determine the school building constructed and the authorization of the Local Authorities Board to determine the local funds for education reduced the responsibility of the local boards. The establishment of the

⁹⁷ See footnote number 94.

School Foundation Program Fund with its 32-mill levy and the decision that the Local Authorities Board had the final say as to the funds available for education reduced the power by which local boards determined or raised the necessary revenues. The School Act still holds the local board responsible for the educational services but the ability to raise the money has been further reduced. Now the local board needs only to raise the amount of the supplementary requisition deemed necessary, and this can be done only indirectly.

SUMMARY

The legislation did not seem to be unduly restrictive to those who planned the schools although there appeared to be a need for some supplementary provisions with regard to land purchases, site preparation, and warehouse or office facilities.

Supplementary requisitions were required in every year in order to provide the facilities and services which the local board thought necessary or desirable.

There appeared to be an extra burden of costs attributable to the legislated provisions of the Alberta Government but these costs could not be ascertained specifically.

The school-building-construction costs were not isolated from the other costs for education, but the evidence shows that the number of students is increasing yearly, the costs per pupil for all purposes is rising, and the interest rate for debentures

has increased. There is, then an inference that school-building-program costs per year have risen, but there is no proof.

Local autonomy in the matter of school building construction has been reduced because the School Buildings Board has the final decision as to the acceptability of the plans and the amount that is approved for assistance under Part F of the School Foundation Program Fund Regulations.

How is the scheme evaluated in terms of some principles of educational finance?

The scheme seemed to be quite adaptable in that allowances were made to meet new requirements or new insights into how to meet old problems. If the scheme were examined as to the provision of an adequate number of schools, it appeared to be quite flexible, but no distinction is made between the small school district's administrative organization and that for a large well-organized city system. There appears to be a need to re-assess the legislative provisions in order to make allowances for the differences in situations and the personnel.

The evidence as to whether or not the legislative provisions increase economy or efficiency is inconclusive. There seemed to be some extra costs due to the implementation of Government legislation because there was some duplication of services but these costs may have been offset by the greater facility in selling debentures. Furthermore, the School Buildings Board may have

increased the efficiency of local operations by eliminating or reducing certain items proposed in local school building plans.

Local responsibility, subject previously to the limits permitted by the Government, appears to have been reduced further because the final decisions as to the structure of the school building and the amount of finances for education are made, or can be made, by the School Buildings Board and the Local Authorities Board respectively. Local responsibility for raising the necessary finances is limited to a request to City Council for a supplementary levy to pay for facilities or services deemed necessary but not financed by the School Foundation Program Fund. Although the local board is charged with a responsibility to provide educational services, it does not have the power to raise the necessary money.

CHAPTER VI

THE SUMMARY, CONCLUSIONS, RECOMMENDATIONS AND AREAS FOR FURTHER STUDY

I. THE SUMMARY AND CONCLUSIONS

The need to investigate the effects on the Edmonton Public Schools of the provincial provisions for the financing and construction of school buildings had its basis in the related literature. American experts in school finance had recommended the examination of any legislation which changed the procedures or the manner of financial support for education. There were, also, numerous fears expressed both by individuals and by groups in Alberta concerning the School Foundation Program and related legislation. There was a need to investigate the adequacy of the Program, a need to appraise the adaptability and flexibility of it, a need to estimate the tendency towards centralization or decentralization, a need to investigate the probable effects upon the costs of education for the local unit, and a need to substantiate or refute the various claims as to the adequacy or inadequacy of the Foundation Program plan and the related legislation. There were fears that the Program would not meet the actual costs of education, that many areas would face increased taxation, that supplementary requisitions would become a yearly necessity for urban areas, that the burden of education costs was

being transferred from the province to the property tax, and that improvements in educational programs would be curtailed if not completely blocked. The claim was made by one person that the Program would curtail the spiralling costs of education, and others claimed that besides a loss in local autonomy there was a strong tendency to expect the local board to provide educational services for which it could not raise the necessary revenue

The procedures used to investigate the effects on the Edmonton Public Schools of the provincial provisions for the financing and construction of school buildings were as follows. First, the related literature in textbooks on school finance and in local publications was read in order to ascertain the areas in which investigation seemed to be required and in order to provide a basis upon which to work. Then the legislation, directives, notices and regulations issued by the Government, or by its agencies, concerning the financing and construction of school buildings were analyzed to see what the probable effects upon the Edmonton Public Schools would be. This step was followed by the examination of public records and by interviews with various officials in the Department of Education and with the Edmonton Public School Board in order to investigate what the effects actually were. The legislated provisions were then evaluated in terms of various sub-problems which fell generally into two categories: (1) What, if any, were the problems in complying with the terms and regulations of the

Acts? and (2) How are the Acts and Regulations evaluated with respect to some of the principles of educational finance?

The legislation was not unduly restrictive to the local officials who planned the schools, but there were a few problems. Although those officials could decide almost entirely upon the design of the structure wanted, they had to observe closely the limit to the building costs of fourteen dollars per gross square foot. Up to one dollar of the fourteen dollars could be used to meet the costs of furniture, equipment and landscaping if the sum of the cost per gross square foot of building, the architect's fees, and the amount permitted for furniture, equipment and landscaping did not exceed the fourteen dollars. This limit, then required the local officials to restrict their buildings to those arrangements which they felt were most essential, or for which they were likely to receive the approval of the School Buildings Board. Therefore, the decisions of the local board chiefly determined the allocation of space and finances to meet the different needs. When the areas and costs approved by the School Buildings Board were exceeded, the extra costs had to be financed from current accounts, from the sale of assets, or from Reserve Funds accumulated before the introduction of the School Foundation Program Fund. The purchase of necessary land and the costs of site improvement in order to build a school could create financial difficulty because there were no allowances for these charges.

Another area of difficulty appeared to be that no forms of government assistance existed for purchasing or building the necessary central office or warehouse facilities, yet these facilities are needed to facilitate the operation of the large, local city system. A large staff of experts in various fields of endeavour has been required in order to administer effectively to the recognized needs of the system and in order to try to meet other needs. Departments for administration, finance, planning, architecture, instruction, pupil personnel services, and maintenance were essential. These departments required housing and, as the system grows, will require more space. Similarly, in order to take advantage of bulk purchase prices, in order to keep an adequate reserve supply to meet requests from schools quickly, and in order to maintain equipment, there had to be sufficient warehouse and shop facilities. These, too, must expand as the system grows. Therefore, the failure of the Government to provide financial assistance to meet these needs will put an extra burden upon the current accounts, will eat away the last of the Reserve Funds, or do both.

Furthermore, the claim that the School Foundation Program would curtail the spiralling costs of education was not fulfilled locally. The average cost per pupil for all purposes and the total cost per year for the local public school education system have both increased. Closely related to this is the fact that supplementary requisitions have been deemed essential by the local personnel

in every year of operation since the inception of the School Foundation Program Fund.

The Government claim that it provided sixteen million dollars in 1963 towards the operation of the Edmonton Public Schools is valid in only one way. The Government did make payments for that amount, but the source of the money is important. In reality, the property taxes for public school supporters in Edmonton during 1963 raised the sum of \$10,444,705 by the 32-mill levy and \$3,091,885 by the supplementary levy, for a total of \$13,536,590. A total of \$20,266,441 was expended for all purposes, of which some \$6,314,872 was provided by the Government from sources other than the property tax upon the local public school supporters. For each year from 1957 to 1963 inclusive the Government's share of the total Edmonton Public School Board costs has been approximately thirty-two per cent. The application of the principle of equalization without disguising the sources of revenue for the local school district would be preferable.

One of the early fears about the legislation was that there would be a loss of local autonomy. Local boards in Alberta have never been completely autonomous, but the designation of authority by the Government for the School Buildings Board and the Local Authorities Board to control the construction of a school building or the finances of a school system has reduced the authority and responsibility of local school boards. While the responsibilities of the local board to provide the facilities have decreased, so

has the authority to raise the necessary revenues in order to provide the educational services been reduced. Therefore, the early statements of fear appear to have been justified. The problem was further aggravated by an inadequate representation of educators upon the School Buildings Board. Of three members on the Board in 1963 only one was an educator, yet the structure of a school building must surely limit or determine the types of educational programs which can be offered within the walls. The buildings constructed should be the result of educational policy.

The differences in the kind and extent of administrative organization between the large city system, like the E.P.S.B., and the smaller systems were not recognized by the Government legislation or actions. The same checks, controls and guidance applied to the smaller units were applied to the larger, more extensively departmentalized city system regardless of whether these controls were necessary or not. That the legislated provisions may be limiting the leadership which such a large system should provide for education in Alberta needs consideration. There is a need to develop school buildings designed to meet the rigors of our climate and to meet our local needs. Should the resolution of our problems depend upon an external Board of three or four, the School Buildings Board? Should the extent to which the local board can raise the necessary revenue be limited by an agency not responsible for educational services, the Local Authorities Board? As Burke

has said, there is a need to provide an opportunity for the willing and able to advance beyond the levels acceptable to others.⁹⁸ Progress depends upon it.

Fortunately, the discretionary powers of the Minister of Education and of the School Buildings Board have permitted many things to be done that were not indicated by clauses in the legislation or regulations. One result is that the Government is now contemplating revision of the legislation, the regulations and the School Building Handbook so that those documents will express the rules by which the Government is operating. That the Government appointed a second educator in 1964 to serve on the School Buildings Board is an improvement which may be indicative of further changes.

II. THE RECOMMENDATIONS

Recommendation 1. That if all districts, divisions, or counties in Alberta are each receiving more from the School Foundation Program Fund and sundry grants than the amounts collected in the area concerned from the 32-mill equalization tax, the Government consider making one grant, based on the numbers of elementary, junior high and senior high school pupils, for all purposes, the formula being such as to allow:

⁹⁸See footnote number 35, page 22 of this thesis.

(a) a degree of support from the Province equivalent to that given for the year 1963, or perhaps better;

(b) a proportionate level of support in the following and future years;

(c) abandonment by the Province of the 32-mill levy on local property owners; and

(d) one property tax levy by the local school district, division or county for the balance of the necessary funds for the following year.

No supplementary requisitions would be required.

Recommendation 2. That the right of appeal to the Local Authorities Board be eliminated.

If appeals are necessary, they might better be made to a committee of provincial Cabinet Ministers which would include the Ministers of Education and Municipal Affairs. Those two Ministers would be knowledgeable about and involved with the practical matters of education and municipal affairs. As Ministers in a Provincial Government, the committee would already be charged with the responsibility to provide for educational services in the Province.

Recommendation 3. That the Government reduce the amount of control over the larger school districts which have separate, well-organized departments of administration, planning, architecture, finance, instruction, pupil personnel services, and maintenance

each led by qualified experts, and that there be a guarantee of a proportionate or better level of financial support, based upon the numbers of students, in subsequent years.

This change would allow the larger districts to serve as "lighthouse" districts or research centers, and it would allow them the opportunity to practice the right and duty of responsibility for educational services.

Recommendation 4. That the Regulations concerning the construction of school buildings be revised. In the new Regulations to accompany the School Buildings Act, that the limit of \$14 per gross square foot of building be retained, but that the following additional or separate allowances be made:

- (a) an allowance for furniture, equipment and landscaping;
- (b) an allowance for the purchase of school land above the amounts set aside for school use by law or community agreement; and
- (c) an allowance for the site development of land owned by the local board.

At present, the \$14 must include the actual cost per gross square foot of building, the architect's fees, and the costs for furniture, equipment and landscaping. The allowance appears inadequate. There is no provision for provincial support with respect to land purchase costs or the cost of site improvement although:

- (a) the available land may be unsuitable as found for the school building or for school grounds; and
- (b) the price of available land has increased.

Recommendation 5. That the Government make some provisions for the financial support of a local board which needs to purchase or to build its own central office or warehouse facilities.

Ample central office and warehouse facilities are essential to the operation of an educational system. For a large district it may be more economical to buy or to build than to rent them.

Recommendation 6. That the terms in the new Regulations to accompany the School Buildings Act, or the School Foundation Program Fund Regulations, allow at least as much as that permitted by the School Buildings Board in the school building plans approved during 1963.

Those terms which involve financial provisions or specifications concerning the dimensions of the various parts of a school building should be clearly stated so that school boards may rightfully know on what basis the decisions will be made.

Recommendation 7. That the composition of the School Buildings Board be revised so that the majority of the Board consists of educators who have taught classes for several years in the public or separate schools of the Province and who may be aware of the implications of the decisions as they apply to instruction in the schools.

Recommendation 8. That, as a safety measure, there be retained in the Regulations the power of discretion to be exercised

by the School Buildings Board or the Minister of Education in the event that the new Regulations prove inadequate in some respect.

The rapid changes occurring today in school building designs and in curriculum present a possibility of unforeseen requests or plans in the future.

Recommendation 9. That the Alberta School Building Handbook be revised in order to bring it up to date and to make it a useful instrument of information.

Recommendation 10. That consideration by the Provincial Government authorities should be given to the provision of a science demonstration and collection room in each elementary school since science education is receiving a changing emphasis at the lower grade levels. The new approach is inclined towards discovery and experimentation by the pupils.

Recommendation 11. That consideration by the Provincial Government should be given to the possibilities of the school library being used and recognized as the school resources center. A larger area in school building plans may be required.

The resources center for the school could contain maps, globes, books, instructional programs, records, and other audio-visual aids to be used by individuals or groups either in the room or in other rooms throughout the school. In larger schools, the full-time librarian might assist in the distribution, use and control of those aids to education.

Recommendation 12. That school boards should plan for and install in the original building as much as possible of the permanent or fixed equipment which the school will need immediately or in the foreseeable future. In this way the costs may be approved capital costs that can be financed as part of the approved debenture debt.

Of course, the limit to the cost per gross square foot of building established by the legislation must be kept in mind.

Recommendation 13. That the Province should avoid any temptation to introduce standard school designs into every district which has need of a school. Different districts have different needs.

Recommendation 14. That new attempts to finance the schools in an effort to realize equality of educational opportunity without penalizing any district should be made.

Lowering the level of freedom in one district in order to increase the opportunity in another creates anxiety and unnecessary problems, yet the basic minimum of educational opportunity should be guaranteed.

III. AREAS FOR FURTHER STUDY

Further studies should be concerned with the structure of completed buildings because the structure may curtail or facilitate the educational programs to be provided in the school. One such

study might be a survey of current construction practices in other areas in an effort to ascertain new ideas for school construction suitable for the variations in our climate. Another topic might be an investigation of the effects of the local by-laws and fire codes on school building designs and construction in Edmonton. In what ways would they restrict new designs? A third topic might be a comparative survey of the legislation concerning the financing and construction of school buildings in the prairie provinces.

Because finances seriously affect the educational services offered in a district, there are studies needed in that field. How do the Provincial Government contributions to districts, divisions or counties compare with the taxes raised from the respective areas by the 32-mill equalization plan, or to amounts raised directly by the taxpayers? Is the Provincial Government paying out more than it collects by property taxes in every case? Has the School Foundation Program equalized educational opportunities? How are the provincial funds for education distributed now? How does the level of support for public schools and for separate schools compare? How should provincial funds be distributed? What is the impact of separate school systems duplicating the public school facilities and services in smaller centers? These are some of the questions which may be worthy of investigation.

In a few years time it may be a good thing to repeat this investigation or to do something better in order to ascertain what the new legislation is and what the impact is upon the Edmonton Public School System at that time.

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